



# ARIZONA SCHOOL FACILITIES BOARD

## Students FIRST Program

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### ProjectTalk

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# *Chapter 1*

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## ARIZONA SCHOOL FACILITIES BOARD

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### Students FIRST Program

# PROJECTTALK.COM BASICS

### Chapter Description

This introduction describes what ProjectTalk.com is and does, how to logon to and log off of ProjectTalk.com and how to navigate its user interface. In addition, it describes how to get help using ProjectTalk.com and it includes a list of sample user names and passwords you can use to log into a sample database. This Chapter contains the following topics:

- A. How ProjectTalk.com Works
- B. Logging On and Logging Off
- C. ProjectTalk.com Help



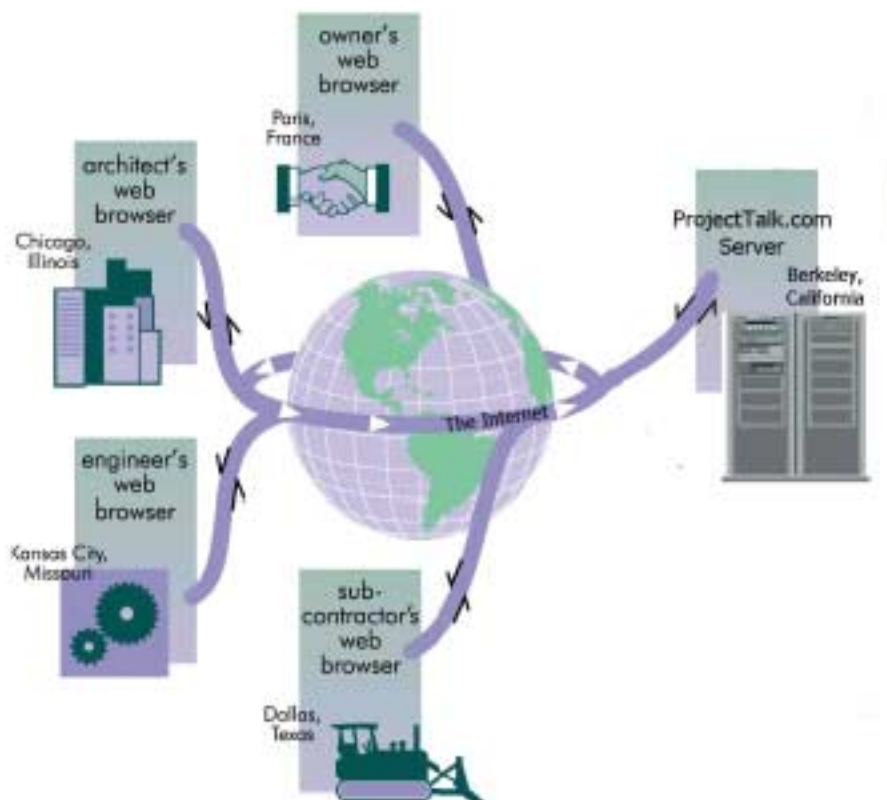
## A. How ProjectTalk.com Works

ProjectTalk.com is a software application delivered over the World Wide Web which enables users to access Prolog Manager data, regardless of where they are located. ProjectTalk.com uses data in Prolog Manager databases. Users with security access can view, add, and/or modify this project data.

The company that hosts a ProjectTalk.com project determines the database setup and gives users permission to work with their data. In this case, the hosting party is the Arizona School Facilities Board. All other users who access this project data need only have Internet access and an Internet browser. ProjectTalk.com is accessed through the Internet.

Changes made to the project data through ProjectTalk.com are automatically sent and added to the Prolog Manager database. The following chart displays the flow of data for a project that uses ProjectTalk.com.

### ProjectTalk.com Data Work Flow



## **Why Use Web Technology in Project Management?**

Projects cannot be completed successfully without a vast amount of communication and collaboration among team members. Decisions and comments must be recorded and distributed quickly to keep processes from slowing down or stopping altogether. Faxing and overnight deliveries are expensive and may not include all of the information required to make a decision. All team members need constant, secure access to project data and documents contained in a single location.

ProjectTalk.com is an electronic solution that provides access through the Internet to all project information. By providing both data management and document management from a single location, all parties involved in the design and construction process can access secure, accurate data from Prolog Manager, as well as up-to-date external documents from anywhere in the world, using a standard Internet browser.

## **What is the Relationship of ProjectTalk.com and Prolog Manager?**

Prolog Manager enables a company to keep track of its important data. Access to Prolog Manager data is restricted to people within a single company. However, data in your Prolog Manager database can support external collaboration processes involving team members outside your company. External collaboration requires an **outward-facing** solution that brings data from outside the hosting company directly into the database.

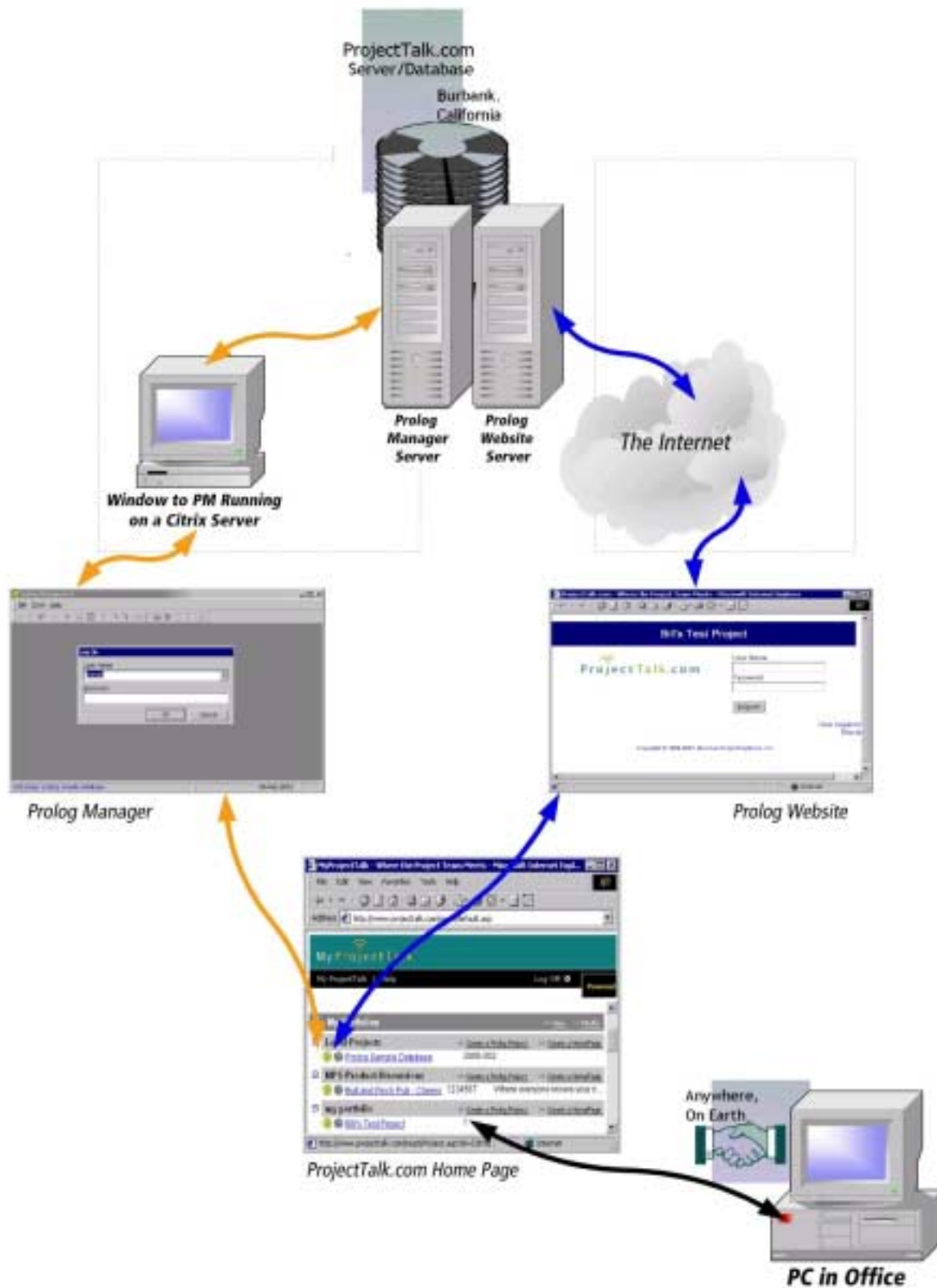
ProjectTalk.com provides all team members both inside and outside the hosting company with a secure interface to answer questions, provide input and feedback, review drawings and documents, and view reports from a single location. Through ProjectTalk.com, the information provided by the other team members is automatically added to the database, thus saving data entry and filing time. This technology provides faster turnaround for answers, reviews, and distribution of documents, and leads to tangible savings associated with the cost of overnight packages, blueprints, phone bills and photo reproductions.

## **What is the Relationship of ProjectTalk.com and Prolog WebSite?**

Prolog Website is an outward facing solution. However, Prolog Website is hosted on a company's own server. Only computers connected to your local area network (LAN) can use your data. ProjectTalk.com uses the tools of Prolog WebSite but it puts them on a server in Burbank, California that anyone (to whom permission is granted) can connect to over the Internet.

## **What are the two sides of ProjectTalk.com?**

The following diagram outlines the ProjectTalk.com login process and overviews the essential ProjectTalk.com components:





When you log into ProjectTalk.com you first log in to the “front door.” Second you select the project whose data you wish to work with. Third, you select whether you want to enter through the “Prolog Manager side” or the “Prolog WebSite side”. Fourth, you log in to that side.

## B. Logging On and Logging Off

Logging on to ProjectTalk.com requires you enter your user name and password twice. First, at the ProjectTalk.com website you log on to view your portfolios. Then you log on to the database to which you have been given access. When you are finished with the project data, simply click **Log Off** and the database closes.

### Task B.1 How do I log on to ProjectTalk.com?

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. Open the Internet browser you will use to view project data.	We strongly recommend Microsoft Internet Explore 4.0 or higher. Other browsers may experience limited functionality.
2. In the <b>Address</b> Field, type <b>www.projecttalk.com</b>	
3. Press ENTER	The ProjectTalk.com home page appears:



4. Click <b>Log On</b>	The ProjectTalk.com <b>Log On</b> dialog appears:
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5. In the <b>Member ID</b> field type your Member ID	
6. In the <b>Password</b> field type your Password.	

## What do I do?

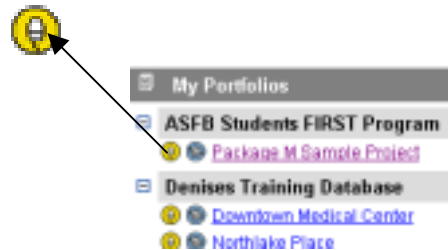
## What happens?/Comments

7. Click **Log On**

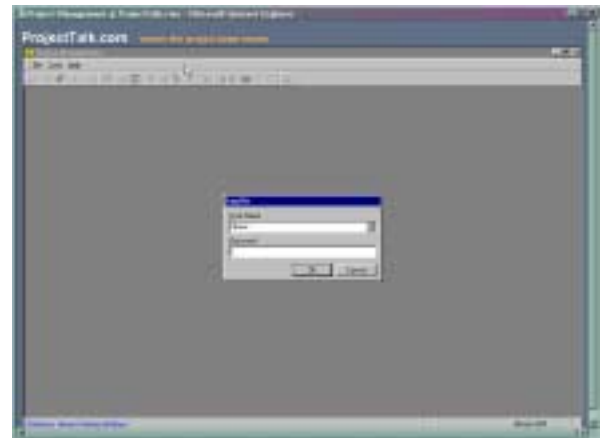
A list of your projects appears:



- 8 Click the small yellow icon next to the Package you wish to enter.



The **ProjectTalk.com** database login screen appears:



Since you are logged in as a Project Manager member of ProjectTalk.com, you could also click the blue button next to the project name to enter the Collaboration side of ProjectTalk.com. Logging into the Collaboration side will give you limited access to the Prolog Manager database.

9. In the **User Name** field, type the User Name that was assigned to you.

Note: Your Member ID that logs you in to ProjectTalk.com (step 4 above) is not necessarily the same name as the User Name that you enter here to log into the database. Your User Name and Password should have been supplied to you via email

### What do I do?

### What happens?/Comments

- 10 In the **Password** field, type the password that was assigned to you.
11. Click **OK**

when you were invited to join the Project.

The Prolog Manager main screen appears and you are now logged in to the Project.



## **Task B.2 How Do I Log Off Prolog Manager?**

To maintain security, always log off your Prolog Manager database, rather than simply closing your browser.

### What do I do?

### What happens?/Comments

1. Close out of the Project Management side of ProjectTalk by clicking the "X" in the upper right hand corner of the screen.
2. On the My ProjectTalk page, click **Log Off**.



The current database closes and the **My ProjectTalk** page re-appears.



My ProjectTalk page closes and the **ProjectTalk.com** home page re-appears.

## C. ProjectTalk.com Help

To assist you in your use of ProjectTalk.com, several options are available to you, including online help and Meridian Project Systems' Technical Support department.

### Task C.1 How Do I Contact Meridian Project Systems' Technical Support

- Call (800) 565-9490 or (916) 294-2100 Monday – Friday, 5am-5pm PST
- Visit SupportLink at Meridian Project Systems' Website at **www.mps.com** for our Knowledge Base and Technical Documentation Library
- Send faxes to (916) 294-2001, or email **tech@mps.com**.
- 

### Task C.2 How Do I Access ProjectTalk.com's Online Help?

#### What do I do?

1. On the My ProjectTalk menu bar, click Help.

#### What happens?/Comments



The ProjectTalk.com Support Services screen opens:



2. Click the ProjectTalk **Help Systems** link. ProjectTalk.com Help appears in a separate browser window:

<u>What do I do?</u>	<u>What happens?/Comments</u>
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### What happens?/Comments



### Task C.3 How Do I Access ProjectTalk.com's Printable User Guide?

<u>What do I do?</u>	<u>What happens?/Comments</u>
----------------------	-------------------------------

### What happens?/Comments

1. On the My ProjectTalk menu bar, click Help.



The ProjectTalk.com Support Services screen opens:



2. Click the **ProjectTalk Online Manual** link.

This manual is in .pdf format. To view it, you must have **Adobe Acrobat Reader** on your computer.

## What do I do?

## What happens?/Comments





# Chapter 2

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## ARIZONA SCHOOL FACILITIES BOARD Students FIRST Program

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# COMPANY SETUP

### Chapter Description

This Chapter will describe the Company information that will be input into Prolog Manager by the System Administrator and show you how to update the company information.

- A. Overview of setting up Companies on a project



## **A. Setting Up Companies and Contacts**

### **Company Setup**

Companies are created by the ASFB by the Project Manager FAXING the required information to MARILYN GOODEN (602) 542-6529.

E-Mail notification MUST be sent to Marilyn Gooden (mgooden@sfb.state.az.us) and Starr Goodspeed (sgoodspeed@sfb.state.az.us)

The timeframe for a new company to be setup is 48 hours. Starr Goodspeed will notify the Project Manager via E-Mail once the company is setup.

The following information is required to setup a company:

W-9 Form ( <a href="http://www.irs.gov/forms_pubs/forms/html">www.irs.gov/forms_pubs/forms/html</a> )	When contracted with ASFB. District contracted entities do NOT require W-9.
<hr/>	
Company Name (as on W-9)	
<hr/>	
Address (Payment Address)	Specify if different from W-9 Address
<hr/>	
Telephone Number	
<hr/>	
Fax Number	
<hr/>	
Federal ID Number	
<hr/>	
Contact Name	Valid E-Mail address required

### **Contact Setup**

Contacts are created by Starr Goodspeed once Company setup is completed.

The following information must be E-Mailed to Starr Goodspeed (sgoodspeed@sfb.state.az.us)

ProjectTalk Access Required (48 Hours for Access):

Company Name

Contact Name

Valid E-Mail Address

Contact Address

Required if multiple company addresses only.

ProjectTalk Access Not Required (24 Hours for Availability):

Company Name

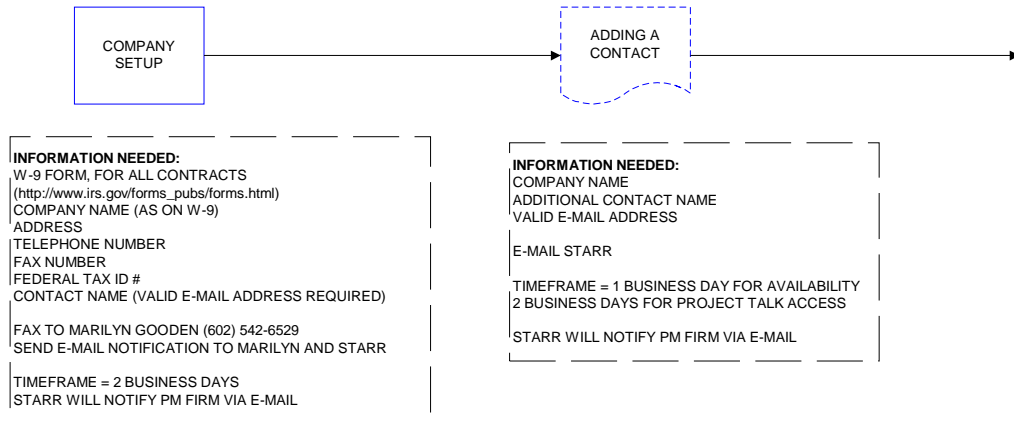
Contact Name

Contact Address

Required if multiple company addresses only.



## COMPANY SETUP



## Task A.1 Reviewing General Company Information

### What do I do?

### What happens?/Comments

1. On the Switchboard, click the **Admin button**, and click **Company Setup**.



Prolog Manager opens the *Company Setup* form.

2. Use the lookup buttons or list view buttons to scroll through records.
3. Use the tabs to view Addresses and Contacts.

# ***Reports***

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# ***Chapter 3***

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## **ARIZONA SCHOOL FACILITIES BOARD**

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### **Students FIRST Program**

# **Site Visitations/Field Reporting**

### **Chapter Description**

This chapter will show you how daily reports are created. You will also learn how to create notices of non-compliance and safety violation notices.:

- A. Daily Reports
- B. Notices of Non Compliance



## A. Creating Daily Reports

ProjectTalk contains several forms to help you track project information on a daily basis. The Daily Work Journal form records the information required for a typical daily construction report, including descriptions of work completed, manpower and equipment usage. The Daily Details form helps you document the daily weather conditions and track jobsite visitors. Using the Events form, you can enter more specific information about types and quantities of work completed.

### Task A.1 How Do I Create a Daily Work Journal Record?

You need to record information about the concrete poured today at the northeast foundation wall. You will create a record in the Daily Work Journal form to track this data. To create the record, you first need to type a description for the work, the name of the company performing the work and the date the work was performed.

#### What do I do?

1. On the Switchboard, click **Field Admin** and on the menu click **Daily Work Journal**

#### What Happens?/Comments



The Daily Work Journal form appears:

A screenshot of the "Daily Work Journal" form. The form has a title bar "Daily Work Journal" and a menu bar with "File", "Edit", and "Help". Below the menu bar is a "Date" field with a dropdown arrow, currently showing "4/20/2001". Below that is a "Crew" field with a dropdown arrow, currently showing "N/A". Below these is a "Daily Work Description" tab, which is selected. Under this tab is a "Work Description" field, which is a large text area. To the right of the text area are three buttons: "Done", "Print Details", and "Return to Complete". Below the text area is a table with columns: "Task", "Task ID", "Task Name", "Status", "Start", "End", "Date", and "Time". Below the table is a "Save" button. At the bottom of the form are several navigation buttons: "Back", "Forward", "Home", "Search", "Print", "Close", and "Cancel".

2. In the **Date** field, press **CTRL + D** Today's date appears
3. In the **Name** field enter the name of the company performing the work.
4. Click the arrow next to the **Crew** list, and select **N/A** You are tracking general information for the concrete pour in this task. A crew name is not necessary.
5. On the **Daily Work Description** tab, in the **Work Description** field, type the description of the work performed.
6. Click **Save**

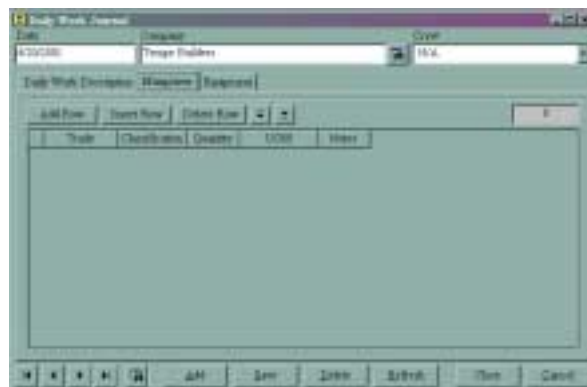
## Task A.2 How do I Track Manpower Information?

The Manpower tab on the Daily Work Journal form enables you to track manpower trade and classification information.

### What do I do?

1. Click the Manpower tab.

### What Happens?/Comments



2. Click Add Row.



A new row appears in the Manpower/Labor grid.

3. Click the arrow in the Trade column, and select Laborer
4. In the Classification column, type: Foreman.
5. In the Quantity column, type: 1
6. In the UOM column, type: day.
7. Click Add Row
8. In the Trade column, type: LAB
9. In the Classification column, type: JOU
10. In the quantity column, type: 4

The foreman worked a full day today

The UOM, or unit of measure, value correlates to the number you entered in the Quantity column. In this task, labor is measured in days.

Another row appears in the Manpower/Labor grid

LAB is the trade code for laborer.

JOU is the classification code for journeyman. You can type the classification code in this field.

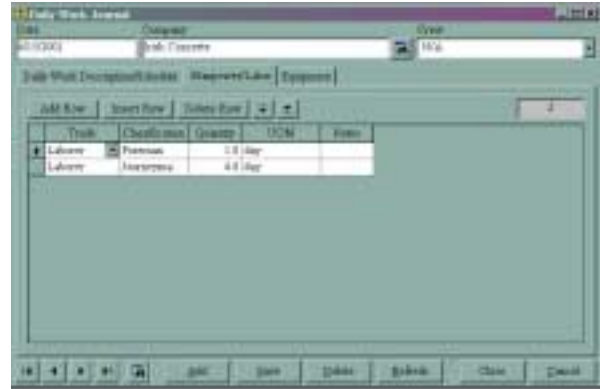
4 indicates the number of journeymen who worked a full day on the job today.



### What do I do?

11. In the UOM column, type: day

### What Happens?/Comments



The screenshot shows the 'Daily Work Journal' window. At the top, there are fields for 'Job' (000000) and 'Job Description' (Job Concrete). Below these are tabs for 'Job Work Description/Notes', 'Materials/Labor', and 'Equipment'. The 'Materials/Labor' tab is active, showing a table with the following data:

Trade	Description	Quantity	UOM	Item
Laborer	Personnel	0.8	day	
Laborer	Materials	4.8	day	

12. Click Save

---

**Note:** Equipment on the jobsite can also be tracked using the Daily Work Journal by clicking on the Equipment tab. We will not track equipment in this exercise.

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### Task A.3 How Do I Create a Daily Details Record?

As part of your daily visit to the jobsite, you can track daily weather conditions and visitors on the site. You can also record general journal entries in the Daily Details form.

#### What do I do?

1. On the switchboard, click **Field Admin** and select **Daily Details**

#### What Happens?/Comments



The Daily Details form opens.

A screenshot of the 'Daily Details' form in a software application. The form has a title bar 'Daily Details' and a menu bar with 'File', 'Options', 'Help'. Below the menu bar are fields for 'Location', 'Station (Optional)', 'Reported by Company', and 'Reported By'. The main area is divided into sections: 'General' with temperature fields (Temp 1 Time, Temp 1 Day, Temp 2 Time, Temp 2 Day, Temp 3 Time, Temp 3 Day), 'Weather Conditions' with buttons for 'Clear', 'Rain', 'Fog', 'Overcast', 'Light Rain', 'Snow', 'Partly Cloudy', 'Windy', and 'Other', and 'Precipitation' with a 'Precipitation' field and a 'Cumulative Precip' field. At the bottom are 'Notes of Events' and 'Notes' text areas, and a row of buttons: 'Add', 'Save', 'Delete', 'Refresh', 'Clear', and 'Cancel'.

2. In the **Reported by Company** type the name of your company
3. Hit **TAB**
4. Click **Save**

### A.4 How Do I Record Weather Information?

In this task, you will track today's weather conditions at the jobsite in the Daily Details form.

#### What do I do?

1. On the **Daily Details** form **General** tab, under **Temperature** click the arrow next to the **Temp 1 Time** list and select **7:00 am**
2. In the **Temp 1 Value** list, type: **95**
3. Under **Weather Conditions**, click the **Windy**, **Light Rain**, and **Overcast** buttons
4. Click the **up arrow** next to **Precipitation** field two times.

#### What Happens?/Comments

Temperatures are to be recorded in Fahrenheit

Prolog Manager enters the text on the buttons in the text field above the weather buttons.

1/10 inch precipitation is added each time you click the up arrow. The Precipitation field should display 0.200

**What do I do?**

**What Happens?/Comments**

5. In the **Wind** field, type: **10-15 mph**

**Task A.5     How Do I Record Daily Notes and Visitors?**

You can track general project information for the day, such as delays, progress notes, or job walks on the General tab of the Daily Details form. You can also enter the names of any jobsite visitors. In this task, you will create an entry to describe the contractor meeting delivery of door frames, and a visit from Barbara Turner, an engineer for Canyon Engineering.

**What do I do?**

**What Happens?/Comments**

1. In the **General Notes** field, type:  
**Material delivery at 1:00 pm.**

**Contractor meeting to discuss  
safety issues.**

**Engineer onsite to review  
moment connections.**

2. In the **Visitors** field, type: **Barbara  
Turner of Canyon Engineering**
3. Click **Save**.
4. Click **Close**

The Daily Details form closes

## B. Notice of Non Compliance

You can use the Notices of Non Compliance form to send notices to contractors directing them to comply with your instructions, or correct a safety violation. You can use the records you create as written or documented proof that you informed a contractor of a violation of project rules, contract documents, safety requirements or any other documents which instruct a contractor to perform in a specific manner.

### Task B.1 How Do I Create a Notice of Non Compliance?

In this task, you will create a notice of non compliance for a contractor who has installed an elevator incorrectly. To create the record, you need to enter the date the notice was created, the notice type, and the subject of the notice.

#### What do I do?

1. On the Switchboard, click **Field Admin** and on the menu, click **Notices of Non Compliance**.

#### What Happens?/Comments



The **Notice of Non Compliance** form appears with the next available record number displayed in the **Number** field.

A screenshot of a software form titled "Notice of Non Compliance". The form has a light blue background and a white border. It contains several fields: "Number", "Date", "Subject", and "Type". Below these are two tabs: "General Information" and "Detailed Information". The "General Information" tab is active and shows fields for "To Contractor", "Initiated By", "Initiated", "Status", "From Contractor", "Authorized By", and "Category". There are also two large text areas: "Notice Details" and "Follow Up Notes". At the bottom, there are buttons for "Add", "Edit", "Delete", "Print", "Cancel", and "Save".

2. In the **Date** field, press **CTRL + D**. Today's date appears.
3. In the **Subject** field, type a description for the notice.
4. In the **Type** list, select **Non-Compliance**
5. Click **Save**

## Task B.2 How Do I Enter Details for a Notice of Non Compliance?

After creating a notice of non-compliance, you can enter details for the notice, such as the reason for the notice, what action needs to be taken by the contractor, and the school that the notice refers to.

## What do I do?

1. On the General Information tab, click the Lookup button next to the To Company field.

### What Happens?/Comments



The Select Company Dialog appears.

[illegible]

2. In the **Select Company** dialog, select the company name
3. Click **OK**
4. In the **From Company** field select the company name.
5. Press the **TAB**
6. In the **Location** field, type: **North wing elevator shaft.**
7. In the **Reference** field, type: **see attached picture dated today.**
8. Under **Notice Details**, in the **Details and Action Required** field, type: **Elevator crew installed the elevator in the north wing shaft upside-down. The crew needs to return to the jobsite in three days to fix this problem.**
9. Click **Save**

The **Select Company** dialog closes and the company name appears in the **To Company** field.


### Task B.3      How Do I Indicate a Follow Up is Required for a Notice of Non Compliance?

You can require follow up for issued notices of non compliance. For this task, you will create a follow up requirement to check on the status of the installation of the elevator after the crew returns to the site.

#### What do I do?

1. On the **General Information** tab of the **Notice of Non Compliance** form, select the **Follow Up** check box.

#### What Happens?/Comments



Follow Up Notes

Scheduled a walk-through for one day after completion

Follow Up    Due By    Done On

☒    4/20/2001   

2. In the **Due By** field, type the date five days from today.
3. In the **Follow Up Notes** field, type: **scheduled a walk-through for one day after completion.**

# ***Reports***

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# ***Chapter 4***

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## **ARIZONA SCHOOL FACILITIES BOARD**

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### **Students FIRST Program**

# **WEEKLY MEETINGS**

### **Chapter Description**

This chapter will show you how to close out meeting minute items, create new meetings, and create new meeting items.

#### **A. Meeting Minutes**



## A. Meeting Minutes

You can use the *Meeting Minutes* form to track information for several types of meetings, such as Architect/Engineer, Contractor Coordination, Executive Directors, Project Managers, and Project Manager/Directors meetings. You can also create new sets of meeting minutes using data from previous meetings, reducing the data entry you need to complete for each meeting. In addition, you can log information for future meetings in each record.

In this set of tasks, you will select and open minutes from an Architect/Engineer meeting that took place. Using the older meeting minutes as a guide, you will close items that have been completed, and create a new meeting minutes record that displays only the items that need to be addressed in the next meeting.

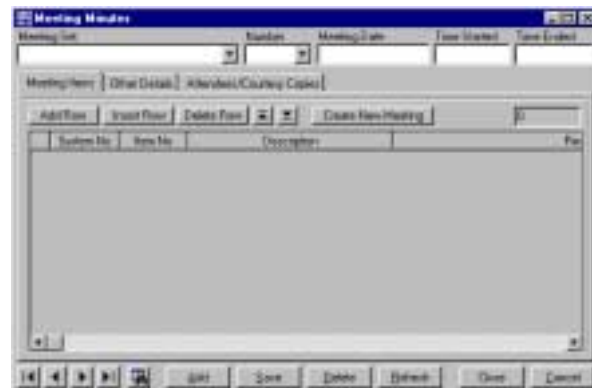
### Task A.1 Customizing the Meeting Items Grid

The Meeting Items grid on the *Meeting Minutes* form contains several columns. As you enter information into each column, or as you scroll through the items in the grid, you might have difficulty knowing for which item you are viewing or entering information. In ProjectTalk, you can "split" a grid so that some columns always appear in the grid and do not move as you scroll horizontally. In this task, you will customize the Meeting Items grid by inserting a splitter after the Item No. column.

#### What do I do?

1. On the Switchboard, click the Engineer button, and click Meeting Minutes.

#### What Happens?/Comments



ProjectTalk opens the *Meeting Minutes* form.

2. Click the Lookup button.



From the list of available records, pick Architect/Engineer meeting and click Edit.

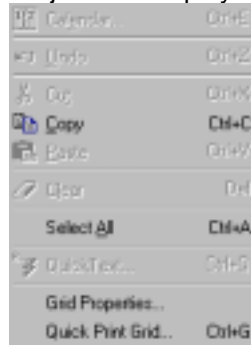
3. Click anywhere in the meeting Items grid, The cursor flashes to indicate the insertion point.

### What do I do?

4. Right-click

### What Happens?/Comments

ProjectTalk displays a shortcut menu.

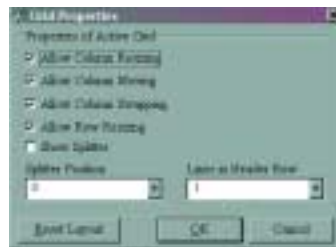


5. Click Grid Properties.

ProjectTalk opens the Grid Properties dialog box.

6. Select the Show Splitter check box.

Using the splitter, you can view two parts of the grid at once. You want to place the splitter after the second column. This enables you to continue to view the meeting item number while scrolling through the other columns in the grid.



7. In the Splitter Position list, select 2.

The number indicates the column after which the splitter is placed.

8. Click OK.

ProjectTalk closes the Grid Properties dialog box.

9. Scroll to the right.

Notice that the Item No column does not move as you scroll.



## Task A.2 Closing Items from Previous Meeting Minutes

In this task, you will create a new Architect/Engineer meeting based on the previous meeting minutes. The meeting items that are not closed carry into the new Meeting Minutes record you will create in the next task. All closed items will not carry forward.

<u>What do I do?</u>	<u>What Happens?/Comments</u>
1. Make sure the <i>Meeting Minutes</i> form is open.	
2. Scroll to the right until you see the Closed column.	The first two columns, System No and Item No, remain in place.
3. Select the check box in the Closed column for Item 1-1.	This item has been completed since the last meeting.
4. Tab to the Completed Date field and hit CTRL+D.	As soon as you hit Tab, Prolog asks if you want to revise the Last Modified field, click Yes.
5. Click Save.	

### Task A.3 Creating Meeting Minutes Using Previous Meeting Information

In this task, you will create a new meeting minutes record, which will include outstanding items from the previous meeting. ProjectTalk enters the data from the previous meeting in a new record for you.

#### What do I do?

1. Click Create New Meeting.
2. Click Yes.

#### What Happens?/Comments

ProjectTalk displays the message, "Do you wish to carry forward all open items?"

ProjectTalk creates a new record. The new meeting number, 2, is displayed in the Number field. Notice the items from Architect/Engineer meeting 1 that have not been marked as closed have carried forward

System No.	Item No.	Complete Date	Last Modified	Closed	Subject
203	203		9/15/1999		School Materials
204	204		9/15/1999		Design Review
205	205		9/15/1999		Updated Issues
206	206		9/15/1999		Arch-Concrete
207	207		9/15/1999		Item Specs
208	208		9/15/1999		Status Log
209	209		9/15/1999		Signets
210	210		9/15/1999		Schedule
211	211		9/15/1999		Elevator Pits
212	212		9/15/1999		Status Log
213	213		9/15/1999		Status Log

3. In the Meeting Date field, change the date to today's date by pressing CTRL+D.
4. Click Add Row. ProjectTalk adds a row to the Meeting Items grid.
5. Type Class Room Layouts in the Subject field. The subject field serves as a header for the minutes of a specific item.
6. In the Description field, first enter the date by typing CTRL+D and then type: The class room layouts were finalized in the dept. head meeting on Wednesday. Bob is having copies made for all subcontractors. This will provide a date reference for when these comments were added to the minutes if the topic is discussed over consecutive weeks or months.
7. Use the Look up button in the Responsible field to assign this task to Bob Smith

**What do I do?****What Happens?/Comments**

8. In the Topic field use the pick list to select Design

9. For Date Due enter today's date by clicking CTRL+D.

10. Click Save.

ProjectTalk saves the new meeting minutes record.

---

Tip You can view the entire contents of a cell that contains several text characters, such as the Description field, by placing the mouse pointer over the cell you want to view. ProjectTalk will display the contents of the cell in a yellow text box. When you move the mouse pointer, ProjectTalk hides the yellow text box.

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Tip You can also see the entire contents of a cell by right-clicking in the cell and selecting Zoom from the pop up menu.

---

**Task A.4 Scheduling Future Meetings**

After you enter the minutes from today's meeting, you can use the Other Details tab to schedule the next meeting. In this task, you will enter the information for the next Staff meeting.

**What do I do?****What Happens?/Comments**

1. Click the Other Details tab

2. In the Next Meeting Date field, type the date one week from today.

3. In the Next Meeting Time field, type: 10:00AM

Note that you can type 10a and ProjectTalk will automatically add a.m.

4. Click Save.

# ***Reports***

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# ***Chapter 5***

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## **ARIZONA SCHOOL FACILITIES BOARD**

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### **Students FIRST Program**

# **COST MANAGEMENT**

### **Chapter Description**

- A. Budget Codes Overview
- B. Creating an A/E Contract
- C. Creating a Contractor Contract

## A. Budget Codes Overview

The Budget Code Structure for the ASFB is a combination of components which allow ProjectTalk and the ASFB database to electronically transfer budget and cost data.

The budget codes and original budget for the Package will be transferred from the ASFB database by the system administrator and available when the Project Manager receives access to the ProjectTalk project.

The Budget Code Structure consists of six main components, fund selection and three sorting lists for reporting purposes.

### **The Budget Code form Components:**



**CTDS:** 9 character ASFB code (County, District, Type of District, School)

**Building:** 4 character ASFB code which specifies the building or location at a school

**Sequential:** 3 character ASFB code which makes the CTDS and Building unique

**Breakdown:** 1 character code which specifies the following:

1. Construction Cost of Work
2. A/E Fees
3. Survey, Testing, Permits, etc.
4. FF&E
5. Project Management
6. Contingency
7. SCIP
8. Non-District Professional Fees

**Scope Assembly:** 2 character code which specifies the type of work.

**District:** 3-character code designating the district the line item is located in.

**Fund:** 1 character ASFB code which specifies the following:

1. Emergency Deficiency Corrections
2. New Construction
3. Deficiency Corrections

The screenshot shows a software window titled "Project Data". It has four tabs: "General", "Financial", "Misc", and "County and District". The "County and District" tab is selected. Inside this tab, there are three dropdown menus labeled "County", "Type of School", and "Type of District". The "County" dropdown is currently empty. The "Type of School" dropdown shows a list of options, including "Elementary", "Middle", and "High School". The "Type of District" dropdown shows a list of options, including "Elementary", "High", and "Unified". At the bottom of the window, there is a toolbar with buttons for "Add", "Delete", "Save", "Print", "Close", and "Cancel".

**County:** The county the line item is located in

**Type of School:** List that specifies the following: Elementary, Middle or High School

**Type of District:** List that specifies the following: Elementary, High or Unified

## Task A.1 Viewing Budget Codes

Budget Codes are loaded electronically from the ASFB and can be viewed only. Modification of Budget Codes must be done through the Potential Change Orders module. This creates a tracking record of changes to budget codes for electronic transfer to the ASFB.

### What do I do?

1. On the switchboard click the **Cost Control** button and select **Budget**.

### What Happens?/Comments



Prolog Manager opens the Budget form.

2. On the lower left of the form choose the **lookup** button



This brings up the selection list of all budget codes currently entered in the system.

3. Select a record by clicking on it and choosing the Edit button or by double clicking the record.

Prolog loads the selected record into the form.

4. Select the **financial** tab.

Item	Budget	Actual	Encumbrance	Committed	Available	Unencumbered
Salaries	100,000	10,000	0	0	90,000	90,000
Benefits	100,000	10,000	0	0	90,000	90,000
Travel	100,000	10,000	0	0	90,000	90,000
Supplies	100,000	10,000	0	0	90,000	90,000
Utilities	100,000	10,000	0	0	90,000	90,000
Other	100,000	10,000	0	0	90,000	90,000
<b>Total</b>	<b>600,000</b>	<b>60,000</b>	<b>0</b>	<b>0</b>	<b>540,000</b>	<b>540,000</b>



5. Click on the **Auto Calculate** button.
6. Click on the **Show Transactions** button.
7. Click **Close**.

Prolog shows the roll-up budget commitments and costs based on the six main components of the budget code.

Prolog shows all transactions against the current budget code.

## Task A.2     Printing Budget Reports

Budget Reports can be printed in a variety of combinations. For this example we will print budget and actual costs grouped by school.

What to do	Results/Comments
1. To print the report, click the Quick Print button on the toolbar.	 Report Manager opens.
2. Select the budget report in “Secure”, “New Budget Reports”.	
3. Click the <b>Run</b> button.	
4. Close the <b>Preview</b> and <b>Report Manager</b> windows.	

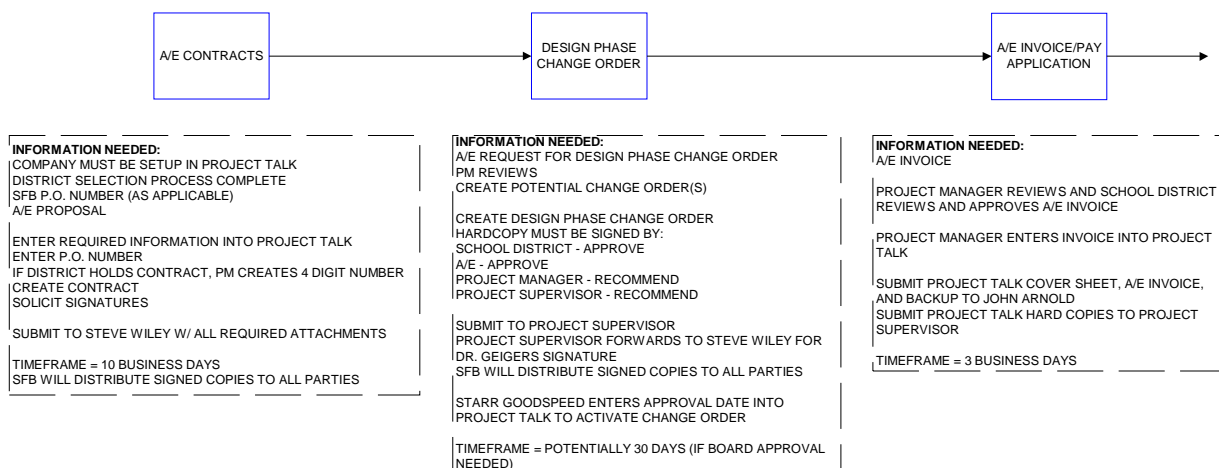
## B. Creating an A/E Contract

### Task B.1 Creating an A/E Contract

A/E Contracts are typically written between a school district and the architect. Once the contract has been created and executed by the A/E it is submitted to Steve Wiley at the ASFB. The contract is executed and distributed to all parties by the ASFB within two weeks.



#### A/E CONTRACTS



### What do I do?

1. On the switchboard, select **Cost Control**. In the menu select **Contracts**.

### What happens?/Comments



The contracts form opens:

A screenshot of the 'Contracts' form in a software application. The form has a title bar 'Contracts' and a menu bar with 'Contract ID', 'ASFB PO Number', 'To Company', 'Short Description', and 'Approved for Budget'. Below the menu bar are tabs: 'Addresses', 'Contract Information', 'Contract Details', 'Change Orders', 'Contract Submittals', 'Detailed Information', 'Contract Summary', 'Contract Info', and 'Help'. The 'Contract Information' tab is active. It contains fields for 'Type of Contract', 'Rate', 'Unit Price', 'Original Contract Price', 'Contract Submittal Price', 'Contract Information Price', 'Contract Summary Price', 'Contract Info Price', and 'Help Price'. There are also fields for 'Contract ID', 'ASFB PO Number', 'To Company', 'Short Description', and 'Approved for Budget'. The form is divided into sections for 'Contract Information', 'Contract Details', 'Change Orders', 'Contract Submittals', 'Detailed Information', 'Contract Summary', 'Contract Info', and 'Help'.

2. Enter the ASFB PO Number.
3. In the **To Company** field, use the pick list to choose the A/E company name.
4. In the **Short Description** field, type the description used to reference the contract.
5. In the **Type of Contract** field, select the type of contract from the pick list.
6. Click the **Detailed Information** tab.

This number may be created by the project manager if the contract is between the District and the A/E. If the contract is between the ASFB and the A/E the ASFB PO Number will be required. To get this number, please contact one of the following people at the ASFB:.

Steve Wiley: 602-364-1632

Carolyn Jelinek: 602-364-0347

Companies and Contacts are setup per the instructions in Chapter 2.

A screenshot of the 'Contracts' form in a software application, showing the 'Detailed Information' tab. The form has a title bar 'Contracts' and a menu bar with 'Contract ID', 'ASFB PO Number', 'To Company', 'Short Description', and 'Approved for Budget'. Below the menu bar are tabs: 'Addresses', 'Contract Information', 'Contract Details', 'Change Orders', 'Contract Submittals', 'Detailed Information', 'Contract Summary', 'Contract Info', and 'Help'. The 'Detailed Information' tab is active. It contains fields for 'Contract ID', 'ASFB PO Number', 'To Company', 'Short Description', and 'Approved for Budget'. The form is divided into sections for 'Contract Information', 'Contract Details', 'Change Orders', 'Contract Submittals', 'Detailed Information', 'Contract Summary', 'Contract Info', and 'Help'.



### What do I do?

### What happens?/Comments

- |   |  |
|---|--|
| 7. Under <b>General Dates</b> , in the <b>Contract Date</b> field enter the date the contract was drawn up.                         | Press <b>CTRL+D</b> , ProjectTalk enters today's date in the Contract Date field.  |
| 8. You can type dates in the Executed On, Notice to Proceed and Actual Start fields as the dates become available.                  |  |
| 9. Enter the <b>Substantial Completion Date</b> .   | The substantial Completion Date is a required field.<br>Exceptions: Building Permit Fees, Plan Check Fees, etc.  |
| 10. In the days field enter the number of days from Substantial Completion the contractor has to complete the work in the contract. |  |
| 11. Press the <b>TAB</b> key.   | ProjectTalk automatically enters the calculated date in the Original Final field. ProjectTalk calculates the Original Final date by adding the number of days to the Orig Substantial date. The Original Final date is the date by which all work on the contract is expected to be completed.<br><br>ProjectTalk days are based on calendar, not work days. |
| 12. Click <b>Save</b> .   | Note: Substantial and Final Completion date fields will lock when a Change Order or Invoice is created against the contract.   |

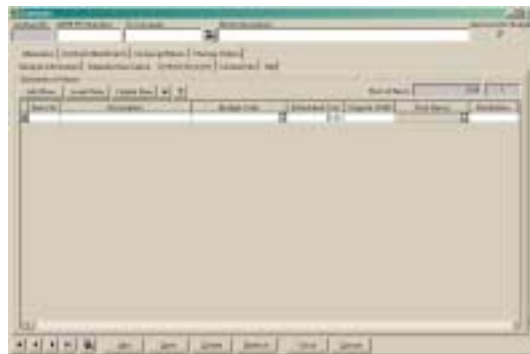
## Task B.2 Entering the Schedule of Values for a Contract

On the Contract Amounts tab, you will create a schedule of values to indicate the cost breakdown of the contract. The schedule of values lists each SFB Project number by breakdown and the associated cost for the activity.

### What do I do?

1. Click the **Contract Amounts** tab.

### What happens?/Comments



2. Click **Add Row**.

Add Row

ProjectTalk adds a row to the Schedule of Values grid.

3. In the **Budget Code** field, use the lookup button to select a cost code.

You may use the filter to narrow the list to the appropriate breakdown code. For example you would filter by breakdown code 2 to see all A/E Fees.

Note: In rare cases, the contract is between the ASFB and the A/E. Breakdown code 8 must be used, in this case. This code indicates the check will be cut directly to the A/E as opposed to the District.

4. In the **Scheduled Cost** column enter the amount contracted for each budget code.

Note: If the scheduled cost exceeds the ASFB budgeted amount follow the procedures for shifting contingency in Chapter 6, Section E once the contract is complete.

5. In the **Original CCAP** enter the Construction Contract Award Price, which is the combination of Breakdown codes #1 and #7.

Note: This field may be at the far right of the grid and the column header may need to be expanded to read "Original CCAP". Columns can be re-organized via drag and drop.

6. Click **Save**.

Notice that the total of the items appears in the Sum of Items field above the grid. The field is gray to indicate that the value is not editable.

## Task B.3 Entering Contact Information

The Contact Info tab tracks who the contract was written from and to. This allows you to track exactly who is responsible for the contract.

### What do I do?

### What happens?/Comments

1. On the Contact Info tab select the District the contract is from in the **From Company** field.
2. In the **To Company** field you may select the specific contact at the company the contract is written to.

## **Task B.4 Generating a Contract using PM Writer**

Now that you have identified the items in the contract, and indicated the company you want to perform the work, you can generate a contract to send to the contractor. You will use a PM Writer template to generate the contract.

### What do I do?

### What happens?/Comments

1. Click the **Link PM Writer Document** button on the toolbar.
2. In the **Template Title** column, select **Lump Sum Agreement for Architectural and Engineering Services**.
3. Click **Proceed**.
4. Click **OK**.
5. Click **Save** in the **PM Writer Documents** window.
6. Click **Close**.



ProjectTalk opens the Create Linked Letters with a PM Writer Template dialog box. Notice that ProjectTalk only displays templates used with potential change orders.

ProjectTalk opens the Contact Pick List.

ProjectTalk opens the PM Writer Documents window and generates a Contractor Agreement to the company the contract is written to.

The contract is linked to the contract record.

ProjectTalk closes the PM Writer Documents window and returns you to the Contracts form.

## **Task B.5 Printing a Contract Report**

In this task, you will use Quick Print to print a report for the contracts.

### What do I do?

### What happens?/Comments

### What do I do?

1. While the contract is open, to print the report, click the Quick Print button on the toolbar.

### What happens?/Comments



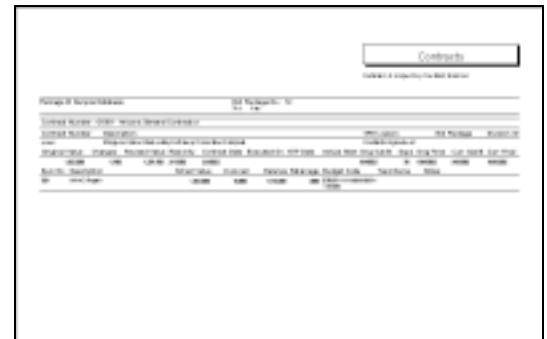
Report Manager opens.



2. Select the Contracts (Detailed, Grouped by Contract Number) report.
3. Click the **Run** button.

The report is located in the Public/Cost Control/Contracts folder.

The report opens:



4. **Close** the Preview and Report Manager windows.

## C. Creating a Contractor Contract

Prior to creating a contractor contract you must complete the FINAL PHASE INSTRUCTIONS which is described below.

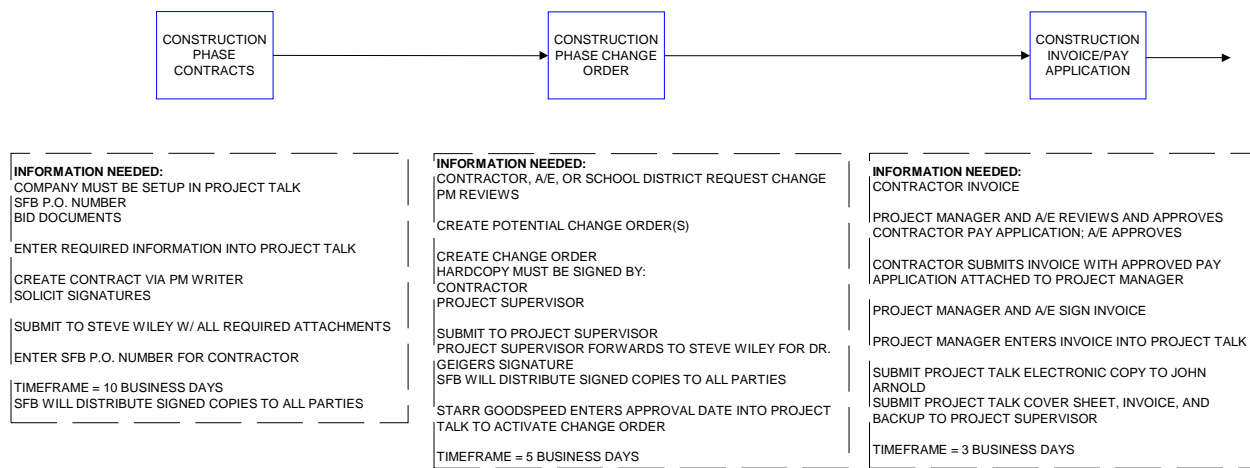
1. Once Bids have been opened, determine the apparent low (Most Responsive & Responsible) Bidder based on the Bid Tabulation Sheet.
2. Once determined, Complete Letter of Intent Request and Fax to the SFB.
3. SFB will prepare Letter of Intent (LOI) and fax to Contractor PM and SCIP. Note: W-9 is required.
4. Once LOI is issued, PM shall follow up with Contractor to get balance of Documents (Payment Bond, Performance Bond, Certificate of Insurance and Contract Signed by Contractor).
5. Forward Complete Bid file and Final Documents to SFB to issue Notice to Proceed (NTP) and Purchase Order.
6. SFB will issue NTP and Purchase Order to Contractor and Copy to PM.
7. Work may now Proceed.

### Task C.1 Creating a Contractor Contract

Contractor Contracts are typically written between the ASFB and the Contractor. Once the contract has been created and executed by the Contractor it is submitted to Steve Wiley at the ASFB. The contract is executed and distributed to all parties by the ASFB within two weeks.



#### CONSTRUCTION PHASE CONTRACTS



## What do I do?

1. On the switchboard, select **Cost Control**. In the menu select **Contracts**.

## What happens?/Comments



The contracts form opens:

Contract ID: 101575224 To Company: [blank] Short Description: [blank] Approved By: [blank]

Contract Name: Contract Summary Contract Type: Fixed Price Contract Start Date: 10/1/2003 Contract End Date: 10/1/2003

Contract Value: 1000000.00 Contract Currency: USD Contract Status: Active Contract Manager: John Doe Contract Owner: John Doe

Contract Description: Contract Summary

Contract Details:

Type of Contract	Rate	Unit Price	Original Contract Value	Contract Manager
Fixed Price	1000000.00	1.00	1000000.00	John Doe
Fixed Price	1000000.00	1.00	1000000.00	John Doe
Fixed Price	1000000.00	1.00	1000000.00	John Doe
Fixed Price	1000000.00	1.00	1000000.00	John Doe

Contract Summary:

Contract ID	Contract Name	Contract Type	Contract Start Date	Contract End Date	Contract Value	Contract Currency	Contract Status	Contract Manager	Contract Owner
101575224	Contract Summary	Fixed Price	10/1/2003	10/1/2003	1000000.00	USD	Active	John Doe	John Doe

2. Enter the ASFB PO Number. This number is required if the contract is written directly with the ASFB.

This number is provided by the ASFB once the Final Phase Instruction (Section B) have been satisfied. To get this number, please contact one of the following people at the ASFB:..

Steve Wiley: 602-364-1632  
Carolyn Jelinek: 602-364-0347

3. In the **To Company** field, use the pick list to choose the company name.

Companies and Contacts are setup per the instructions in Chapter 2.

4. In the **Short Description** field, type the description used to reference the contract.

5. In the **Type of Contract** field, select the type of contract from the pick list.

6. Click the **Detailed Information** tab.

The screenshot shows the 'New Contract' window in the 'Contract Management' application. The window is titled 'Contract Management' and has a menu bar with 'File', 'Edit', 'View', 'Tools', 'Help', and 'Contract'. The main area is divided into several sections: 'Contract Details' (Contract ID: 123456, Contract Name: ABCDEF, Contract Type: General Contract, Contract Status: Open, Contract Date: 12/31/2010, Contract End Date: 12/31/2011), 'Contract Parties' (Contract Party: ABCDEF, Contract Party Type: General Contract, Contract Party Status: Open, Contract Party Date: 12/31/2010, Contract Party End Date: 12/31/2011), 'Contract Documents' (Contract Document: ABCDEF, Contract Document Type: General Contract, Contract Document Status: Open, Contract Document Date: 12/31/2010, Contract Document End Date: 12/31/2011), and 'Contract History' (Contract History: ABCDEF, Contract History Type: General Contract, Contract History Status: Open, Contract History Date: 12/31/2010, Contract History End Date: 12/31/2011). The bottom of the window has a status bar with 'Contract Management' and 'Contract ID: 123456'.

### What do I do?

### What happens?/Comments

7. Under **General Dates**, in the **Contract Date** field enter the date the contract was drawn up.
8. You can type dates in the Executed On, Notice to Proceed and Actual Start fields as the dates become available.
9. Enter the **Substantial Completion Date**.
10. In the days field enter the number of days from Substantial Completion the contractor has to complete the work in the contract.
11. Press the **TAB** key.

Press **CTRL+D**, ProjectTalk enters today's date in the Contract Date field.

ProjectTalk automatically enters the calculated date in the Original Final field. ProjectTalk calculates the Original Final date by adding the number of days to the Orig Substantial date. The Original Final date is the date by which all work on the contract is expected to be completed.

ProjectTalk days are based on calendar, not work days.

12. Click **Save**.

Note: Substantial and Final Completion date fields will lock when a Change Order or Invoice is created against the contract.

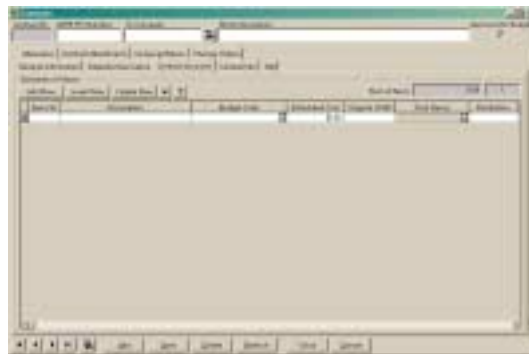
## Task C.2 Entering the Schedule of Values for a Contract

On the Contract Amounts tab, you will create a schedule of values to indicate the cost breakdown of the contract. The schedule of values lists each SFB Project number by breakdown and the associated cost for the activity.

### What do I do?

1. Click the **Contract Amounts** tab.

### What happens?/Comments



2. Click **Add Row**.
3. In the **Budget Code** field, use the lookup button to select a cost code.
4. In the **Scheduled Cost** column enter the amount contracted for each budget code.
5. Click **Save**.

Add Row

ProjectTalk adds a row to the Schedule of Values grid.

You may use the filter to narrow the list to the appropriate breakdown code. For example you would filter by breakdown code 1 to see all Construction Cost of Work.

Note: If the scheduled cost exceeds the ASFB budgeted amount follow the procedures for shifting contingency in Chapter 5, Section E once the contract is complete.

Notice that the total of the items appears in the Sum of Items field above the grid. The field is gray to indicate that the value is not editable.

## Task C.3 Entering Contact Information

The Contact Info tab tracks who the contract was written from and to. This allows you to track exactly who is responsible for the contract.

### What do I do?

1. On the Contact Info tab select the company name and contact of the entity letting (awarding) the contract in the **From Company** field.
2. In the **To Company** field you may enter the specific contact at the company the contract is written to.


### What happens?/Comments

This information is required if the contract is not between the ASFB and the contractor, consultant, etc. (ex. District contracts).



## Task C.4 Generating a Contract using PM Writer

Now that you have identified the items in the contract, and indicated the company you want to perform the work, you can generate a contract to send to the contractor. You will use a PM Writer template to generate the contract.

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. Click the <b>Link PM Writer Document</b> button on the toolbar.	 ProjectTalk opens the Create Linked Letters with a PM Writer Template dialog box. Notice that ProjectTalk only displays templates used with potential change orders.
2. In the <b>Template Title</b> column, select <b>ASFB – Contractor Agreement</b> .	
3. Click <b>Proceed</b> .	ProjectTalk opens the Contact Pick List.
4. Click <b>OK</b> .	ProjectTalk opens the PM Writer Documents window and generates a Contractor Agreement to the company the contract is written to.
5. Click <b>Save</b> in the <b>PM Writer Documents</b> window.	The contract is linked to the contract record.
6. Click <b>Close</b> .	ProjectTalk closes the PM Writer Documents window and returns you to the Contracts form.

## Task C.5 Printing a Contract Report

In this task, you will use Quick Print to print a report for the contracts.

<u>What do I do?</u>	<u>What happens?/Comments</u>
----------------------	-------------------------------

### What do I do?

1. To print the report, click the Quick Print button on the toolbar.

### What happens?/Comments



Report Manager opens.



2. Select the Contracts (Detailed, Grouped by Contract Number) report.
3. Click the **Run** button.

The report opens:



4. **Close** the Preview and Report Manager windows.

# ***Reports***

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# Chapter 6

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## ARIZONA SCHOOL FACILITIES BOARD

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### Students FIRST Program

# CHANGE ORDERS

#### Chapter Description

The ASFB version of ProjectTalk provides features for creating, tracking and documenting all correspondence concerning contractor related changes. The data entered into the Potential Change Order (PCO) and Change Order (CO) screens will be reviewed by the ASFB Liaisons and Districts, so it is important that the data is entered consistently and accurately.

This section covers the following topics:

- A. Creating Potential Change Orders
- B. Creating Potential Change Orders for Contingency Use
- C. Creating Design Phase Change Order (DPCO)
- D. Creating Contractor Change Orders
- E. Contingency Use (Budget Changes)



## The Change Order Process

Of any data entered into ProjectTalk, data related to the change process will be the most frequently reviewed data by the ASFB. This data will also be linked directly to invoices and uploaded electronically by the ASFB system for processing payments.

In using ProjectTalk for the first time, it is not uncommon to get the perception that the procedures you are about to learn are adding a significant amount of additional data entry above and beyond what you normally perform. It is important to note that the efficiency gained by using ProjectTalk to manage changes is derived at the end of the change process via the production of your change order report form and contractor change order forms. An even greater efficiency is realized during closeout of the project when contracts are closed out.

## A. Creating Potential Change Orders

The starting point of tracking a Design Phase Change Order or Contractor Change Order is a potential change order. A potential change order is any item that may result in a change to the project schedule or the project budget. A potential change order can be the result of Contractor, A/E or School District Recommendations that the project manager has approved.

### Task A.1 Creating a Potential Change Order

A change has occurred which will affect a contract amount. To document the changes and track the effects of the changes you need to create a potential change order. In this task, you will enter the general information for the potential change order.

#### What do I do?

1. Click the **Cost Control** button on the Switchboard, and click **Potential Change Orders**.

#### What happens?/Comments



ProjectTalk opens the Potential Change Orders form.

A screenshot of a software window titled "Potential Change Orders". The window has a menu bar with "File", "Edit", "Format", "Tools", "Window", and "Help". Below the menu bar is a toolbar with icons for "New", "Open", "Save", "Print", "Find", "Find Next", "Find Previous", "Go To", "Cancel", and "OK". The main area of the form is divided into several sections. At the top, there are fields for "Number", "Description", "Status", and "Approved by Project". Below these are tabs for "New & Submittal", "Detailed Submittal", and "List Price Submittal". The "New & Submittal" tab is active, showing fields for "Item #", "Item", "Reason", "Schedule in Submittal", "Requested Item", and "Approved Item". There is a large text area for "Comments" and a "COO Number" field at the bottom. The bottom of the window has a status bar with "Add", "Get", "Save", "Print", "Find", "Find Next", "Find Previous", "Go To", "Cancel", and "OK" buttons.

Notice that ProjectTalk automatically assigns the next sequential number to the potential change order.

2. In the Description field type a short description for the PCO.
3. In the Date field, press **CTRL+D**.

ProjectTalk enters today's date in the Date field.



## What do I do?

4. In the **Reason** field, use the drop list and choose the appropriate selection.

5. In the **Notes** field enter additional notes or clarifications.

6. In the References field enter any reference information. This field is not required.

7. Select the **Detailed** Information tab.

8. Select **Add Row**

9. In the **Budget Code** field from the drop down list select the budget code for this line item.

10. ProjectTalk will ask if you want to use the default description for the budget code. You may use the default or select no and type your own description.

## What happens?/Comments

This field will automatically display the reference document if you link it via the Create PCO button on the toolbar.



Line item #001 is created

Budget Code	CTBS	Building	Sequence	Breakdown	Scope	Control
000201119-0000-000-1-00-000	000201119	0000	000	1	02	000
000201119-0000-000-2-00-000	000201119	0000	000	2	02	000
000201119-0000-000-3-00-000	000201119	0000	000	3	02	000
000201119-0000-000-4-00-000	000201119	0000	000	4	02	000
000201119-0000-000-5-00-000	000201119	0000	000	5	02	000
000201119-0000-000-6-00-000	000201119	0000	000	6	02	000
000201119-0000-000-7-00-000	000201119	0000	000	7	02	000
000201119-0000-000-8-00-000	000201119	0000	000	8	02	000
000201119-0000-000-9-00-000	000201119	0000	000	9	02	000
000201119-0000-000-10-00-000	000201119	0000	000	10	02	000
000201119-0000-000-11-00-000	000201119	0000	000	11	02	000
000201119-0000-000-12-00-000	000201119	0000	000	12	02	000
000201119-0000-000-13-00-000	000201119	0000	000	13	02	000
000201119-0000-000-14-00-000	000201119	0000	000	14	02	000
000201119-0000-000-15-00-000	000201119	0000	000	15	02	000
000201119-0000-000-16-00-000	000201119	0000	000	16	02	000
000201119-0000-000-17-00-000	000201119	0000	000	17	02	000
000201119-0000-000-18-00-000	000201119	0000	000	18	02	000
000201119-0000-000-19-00-000	000201119	0000	000	19	02	000
000201119-0000-000-20-00-000	000201119	0000	000	20	02	000

### What do I do?

11. In the **Approved Amount Cost** field:  
Enter the amount for the line item.

### What happens?/Comments

The screenshot shows the 'Potential Change Order' form. The 'Budget Summary' section has a table with columns: Budget, Cost, Proposed, Approved, and Applied. The 'Revised Breakdown' section has a table with columns: Tag Estimate, Proposed Cost, Approved Cost, Applied Cost, Cost Allocation, and Comments. The 'Approved Cost' column is highlighted in yellow.

There are three columns used for entering contractor amounts (Yellow Fields).

**Original estimate** is the best guess number and may not have input from the contractor.

**Proposed amount** is the amount requested by the contractor.

**Approved amount** is the amount agreed upon by the Project Manager, ASFB, Contractor and District and entered by the Project Talk Administrator.

12. In the **Cost Allocation** field: Select **Pending Commitment**

The screenshot shows the 'Cost Allocation' dialog box. The 'Pending Commitment' option is selected under the 'Specify Allocation for Cost Type' section. A text box on the right explains that this allocation is used for pending commitments and is not used for other changes.

13. In the **Net Change to CCAP** field enter the amount to increase or decrease CCAP.
14. In the **Company** field select the company name and contact.
15. In the **Quote Due** field enter the date the quote is due from the contractor.
16. Click **Save**.

This field is Required on line items which will be included in DPCO's. This field is not used for other changes.

This allows the Change Order module to only select PCO items attached to each company when linking PCO items.

## Task A.2     Printing an Potential Change Order

In this task, you will use Quick Print to print a report.

### What do I do?

1. While the record is open, to print the report, click the **Quick Print** button on the toolbar.
2. Select the **Potential Change Order (Detailed)** report.

### What happens?/Comments

Report Manager opens.




3. Click the **Run** button.



4. **Close** the Preview and Report Manager windows.

### Task A.3      Generating a Request for Proposal using PM Writer

Now that you have identified the items in the potential change order, and indicated the company you want to perform the work for each potential change order item, you can generate request for proposal letters to send to the contractors. You will use a PM Writer template to generate the letters.

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. Select the row in the Itemized Breakdown grid.	
2. Click the Link PM Writer Document button on the toolbar.	 ProjectTalk opens the Create Linked Letters with a PM Writer Template dialog box. Notice that ProjectTalk only displays templates used with potential change orders.
3. In the Template Title column, select Request for Proposal.	
4. Click Proceed.	ProjectTalk opens the Contact Pick List.  Notice that ProjectTalk automatically displays the name of the company and contact in the Selection List. This is the contact person for item 001 in the potential change order.
5. Click OK.	ProjectTalk opens the PM Writer Documents window and generates a letter to the selected contact.
6. Click Save in the PM Writer Documents window.	The letter is linked to the potential change order record.
7. Click Close.	ProjectTalk closes the PM Writer Documents window and returns you to the Potential Change Orders form.

## B. Creating Potential Change Orders for Contingency Use

### Task B.1 Creating a Potential Change Order for Contingency Use

Potential Change Orders are also for using Contingency. This allows contingency from any project within the Project Manager's letter package to fund a project within a bid package which does not have sufficient funds to cover the contract amount. Contingency use does NOT require a change order.

#### What do I do?

1. Click the **Cost Control** button on the Switchboard, and click **Potential Change Orders**.

#### What happens?/Comments



ProjectTalk opens the Potential Change Orders form.

A screenshot of the "Potential Change Orders" form in ProjectTalk. The form has a title bar at the top. Below the title bar, there are several tabs: "New & Submittals", "Detailed Submittals", and "Tab Print Statements". The "New & Submittals" tab is selected. The form contains several fields: "Order #", "Date", "Description", "Amount", "Schedule & Budget", "Requested Item", and "Approved Item". The "Description" field is the largest and is currently empty. The "Amount" field has a dropdown arrow. The "Schedule & Budget" field has a dropdown arrow. The "Requested Item" field has a dropdown arrow. The "Approved Item" field has a dropdown arrow. At the bottom of the form, there are several buttons: "Add", "Get", "Save", "Print", "Close", and "Cancel".

Notice that ProjectTalk automatically assigns the next sequential number to the potential change order.

2. In the Description field type a short description for the PCO.
3. In the Date field, press **CTRL+D**.

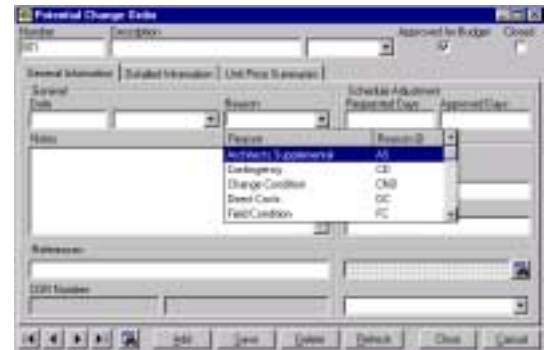
Contingency use and the corresponding bid package PCO number should be mentioned in the description.

ProjectTalk enters today's date in the Date field.

## What do I do?

4. In the **Reason** field, use the drop list and choose **Contingency**.

## What happens?/Comments



5. In the **Notes** field enter additional notes or clarifications.
6. In the **References** field enter any reference information. This field is not required.
7. Select the **Detailed** Information tab.
8. Select **Add Row**
9. In the **Budget Code** field from the drop down list select the budget code for this line item.

This information is not required.

This field will automatically display the reference document if you link it via the Create PCO button on the toolbar.



Line item #001 is created

Budget Code	CTBS	Building	Sequence	Breakdown	Scope	Control
000201119-0000-000-1-00-000	000201119	0000	000	1	00	000
000201119-0000-000-2-00-000	000201119	0000	000	2	00	000
000201119-0000-000-3-00-000	000201119	0000	000	3	00	000
000201119-0000-000-4-00-000	000201119	0000	000	4	00	000
000201119-0000-000-5-00-000	000201119	0000	000	5	00	000
000201119-0000-000-6-00-000	000201119	0000	000	6	00	000
000201119-0000-000-7-00-000	000201119	0000	000	7	00	000
000201119-0000-000-8-00-000	000201119	0000	000	8	00	000
000201119-0000-000-9-00-000	000201119	0000	000	9	00	000
000201119-0000-000-10-00-000	000201119	0000	000	10	00	000
000201119-0000-000-11-00-000	000201119	0000	000	11	00	000
000201119-0000-000-12-00-000	000201119	0000	000	12	00	000
000201120-0000-000-1-00-000	000201120	0000	000	1	00	000
000201120-0000-000-2-00-000	000201120	0000	000	2	00	000

10. ProjectTalk will ask if you want to use the default description for the budget code. You may use the default or select no and type your own description.

Using the default description and adding "Contingency add" or "Contingency deduct" would be a good description.

## What do I do?

11. In the **Contingency Use Amount** field:  
Enter the amount for the row.

## What happens?/Comments

The screenshot shows the 'Potential Change Order' window. At the top, there are tabs for 'Contingency Use Amount' and 'Budget Allocation'. Below the tabs, there are fields for 'Contingency Use Amount' and 'Budget Allocation'. The 'Contingency Use Amount' field is highlighted, and the user is instructed to enter the amount for the row.

12. In the **Contingency Use Amount** field:  
Enter the deductive amount for the row that balances the transaction in step 11.

Specific contingency uses are explained in greater detail in Section E of this chapter.

13. In the **Budget Allocation** field: Select **Approved Revisions** for items 11 and 12 above.

The screenshot shows the 'Specify Budget System Allocations for PCD Item' window. The 'Budget Allocation' tab is selected. The 'Budget Allocation' field is highlighted, and the user is instructed to select 'Approved Revisions' for items 11 and 12 above.

14. In the **Cost Allocation** field: Select **No Cost Allocation** for items 11 and 12 above.

The screenshot shows the 'Specify Budget System Allocations for PCD Item' window. The 'Cost Allocation' tab is selected. The 'Cost Allocation' field is highlighted, and the user is instructed to select 'No Cost Allocation' for items 11 and 12 above.

15. Click **Save**.

The specific types of contingency uses and the associated screen shots are included in Task E of this chapter.

## Task B.2 Printing an Potential Change Order

In this task, you will use Quick Print to print a report for a Potential Change Order.

### What do I do?

1. While the record is open, to print the report, click the **Quick Print** button on the toolbar.
2. Select the **Potential Change Order (Detailed)** report.

### What happens?/Comments

Report Manager opens.



3. Click the **Run** button.



4. **Close** the Preview and Report Manager windows.



## C. Creating Design Phase Change Orders

If an A/E contract requires an addition or reduction of funds and/or time, you need to create a Design Phase change order. A Design Phase change order indicates the amount of money and the number of days the ASFB has agreed to give an A/E to complete additional work and/or the amount the ASFB has agreed to increase/decrease the CCAP.

A DPCO is created and must be signed by all parties listed on the form (School District, A/E, Project Manager and Project Supervisor). Once executed the DPCO is submitted to the Project Supervisor and will be approved within 30 days. The ASFB will then distribute the fully executed DPCO to all parties. The ProjectTalk Administrator will then enter the executed date to allow the ASFB system to electronically upload the DPCO. Change Orders are uploaded electronically by the ASFB on Tuesday and Thursday.

### Task C.1 Creating a Design Phase Change Order

You need to create a design phase change order for additional A/E services. It is important to note the DPCO is linking to a PCO. The majority of the work is processed at the PCO level and should be completed prior to creating a DPCO.

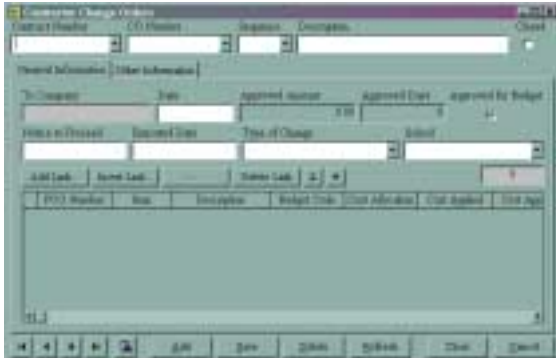
#### What do I do?

1. Click the **Cost Control** button on the Switchboard, and click **Change Orders**.

#### What happens?/Comments



The Change Orders form opens.

A screenshot of the ProjectTalk software interface. The window title is "ProjectTalk Change Orders". It features a "General Information" tab and a "Description" field. There are several input fields for "Contract Number", "Sequence", "Description", "To Company", "From", "Approved Amount", "Approved Date", and "Approved by Budget". Below these fields is a table with columns for "Item", "Amount", "Description", "Budget Code", "Cost Allocation", "Cost Budget", and "Cost App". The table is currently empty. At the bottom of the window, there are navigation buttons: "Back", "Forward", "Print", "Save", "Cancel", and "Exit".

2. In the **Contract Number** list, select the contract number.
3. On the **General Information** tab, in the **Description** field, type a description for the DPCO.

After you select the contract number, ProjectTalk automatically assigns the next CO Number and Sequence number to the record. ProjectTalk also automatically enters the company name in the **To Company** field on the General Information tab.

<u>What do I do?</u>	<u>What happens?/Comments</u>
4. In the <b>Date</b> field, press <b>CTRL+D</b> .	
5. In the <b>Approved Days</b> field, type the number of days to be added or deducted to the contract.	ProjectTalk recognizes calendar days only.
6. In the <b>Type of Change</b> field: select <b>District to Contractor/AE</b>	In a small percentage of cases a contract may be written between the ASFB and the A/E, which would make the Type of Change a ASFB to Contractor/AE.
7. Click <b>Add Link</b> .	The Select Potential Change Order dialog box opens. The dialog box only lists potential change order items for which the company in the To Company field is the contact.
8. Select the PCO Item, then click <b>OK</b> .	ProjectTalk inserts the potential change order items into the grid on the Contractor Change Orders form.
9. Click <b>Save</b> .	
10. When the DPCO is returned from the ASFB and executed, the executed date field will be entered by the ProjectTalk Administrator.	

## Task C.2 Adding Signature Information

The last step in creating the Design Phase Change Order is to add the signature information. ProjectTalk will use this information to address the change order form to the correct location.

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. On the <b>Other Information</b> tab, use the look-up button to select the contact in the <b>To Contact</b> field.	
2. In the <b>From Contact</b> field, select the from contact at the School District.	
3. Click <b>Save</b> .	The form is now ready to print.

## Task C.3 Printing a Design Phase Change Order Report

In this task, you will use Quick Print to print a report for a DPCO.

<u>What do I do?</u>	<u>What Happens?/Comments</u>
----------------------	-------------------------------

## What do I do?

1. To print the report, click the **Quick Print** button on the toolbar.

### What Happens?/Comments



Report Manager opens.



2. Select the **Design Phase Change Order** report.
3. Click the **Run** button.

[illegible]

4. Close the Preview and Report Manager windows.

## D. Creating Contractor Change Orders

If a contract requires additional work or material from a Contractor, you need to create a contractor change order. A contractor change order indicates the amount of money and the number of extra days the ASFB has agreed to give a contractor to complete a specified amount of work.

### Task D.1 Creating a Contractor Change Order

You need to create a contractor change order for a Contractor. In this task, you will create a contractor change order for a contract.

#### What do I do?

1. Click the **Cost Control** button on the Switchboard, and click **Change Orders**.

#### What happens?/Comments



The Change Orders form opens.

A screenshot of a software window titled 'Contractor Change Orders'. The window has a menu bar with 'File', 'Edit', 'Format', 'Window', and 'Help'. Below the menu bar is a toolbar with buttons for 'New', 'Open', 'Save', 'Print', 'Find', 'Find Next', 'Find Previous', 'Find All', 'Find Close', 'Find Cancel', 'Find Help', 'Find About', 'Find Exit', 'Find Quit', 'Find Run', 'Find Stop', 'Find Pause', 'Find Resume', 'Find Reset', 'Find Default', 'Find Cancel', 'Find Help', 'Find About', 'Find Exit', 'Find Quit', 'Find Run', 'Find Stop', 'Find Pause', 'Find Resume', 'Find Reset', 'Find Default'. The main area of the form is divided into several tabs: 'General Information', 'Other Information', 'To Company', 'Date', 'Approved Amount', 'Approved Days', 'Approved by Budget', 'Items to Process', 'Entered Date', 'Type of Change', and 'Select'. The 'General Information' tab is currently selected. It contains fields for 'Contract Number', 'CO Number', 'Sequence', 'To Company', 'Date', 'Approved Amount', 'Approved Days', 'Approved by Budget', 'Items to Process', 'Entered Date', 'Type of Change', and 'Select'. There are also buttons for 'Add Task', 'Delete Task', 'Status Task', and 'Print'. At the bottom of the window is a status bar with the text '11.1'.

2. In the **Contract Number** list, select the contract number.
3. On the **General Information** tab, in the **Description** field, type a short description for the change order
4. In the **Date** field, press **CTRL+D**.
5. In the **Approved Days** field, type the number of days added or deducted by this change order.
6. In the **Type of Change** field: select **ASFB to Contractor/AE**.

After you select the contract number, ProjectTalk automatically assigns the next CO Number and Sequence number to the record. ProjectTalk also automatically enters the company's name in the **To Company** field on the General Information tab.

This will enter today's date, if you would like another date you may enter it.

### What do I do?

7. Click **Add Link**.
8. Select the record, then click **OK**.
9. When the change order is returned and executed the executed date field will be entered by the ProjectTalk Administrator.
10. Click **Save**.

### What happens?/Comments

The Select Potential Change Order dialog box opens. The dialog box only lists potential change order items for which the company in the To Company field is the contact.

ProjectTalk inserts the potential change order items into the grid on the Contractor Change Orders form.

## **Task D.2 Adding Signature Information**

The last step in creating the Contractor Change Order is to add the signature information. ProjectTalk will use this information to address the change order form to the correct location.

### What do I do?

1. On the Other Information tab, use the look-up button to select the **To Contact**.
2. In the **From Contact** field, select the contact the change order is from.
3. Click **Save**.

### What happens?/Comments

The form is now ready to print.

## **Task D.3 Printing a Contractor Change Order Report**

In this task, you will use Quick Print to print a report for a contractor change.

### What do I do?

1. To print the report, click the **Quick Print** button on the toolbar.

### What Happens?/Comments



Report Manager opens.



### What do I do?

2. Select the **Contractor Change Order** **[Each]** report.
3. Click the **Run** button.

### What Happens?/Comments

The screenshot shows a web-based form titled "Contractor Change Order". At the top left is the Arizona School Facilities Board logo. Below the logo, the text reads "Arizona School Facilities Board" and "Contractor Change Order". To the right of the logo, there is a section for "Contractor Information" with fields for "Contractor Name", "Contract Number", and "Contract Line Number". Below this, there is a section for "Contractor Change Order" with fields for "Change Order Number", "Change Order Description", and "Change Order Amount". The form also includes a table with columns for "Item", "Description", "Quantity", "Unit", and "Amount". At the bottom of the form, there are sections for "APPROVED BY" and "DATE" for both the "SCHOOL FACILITIES BOARD" and the "CONTRACTOR".

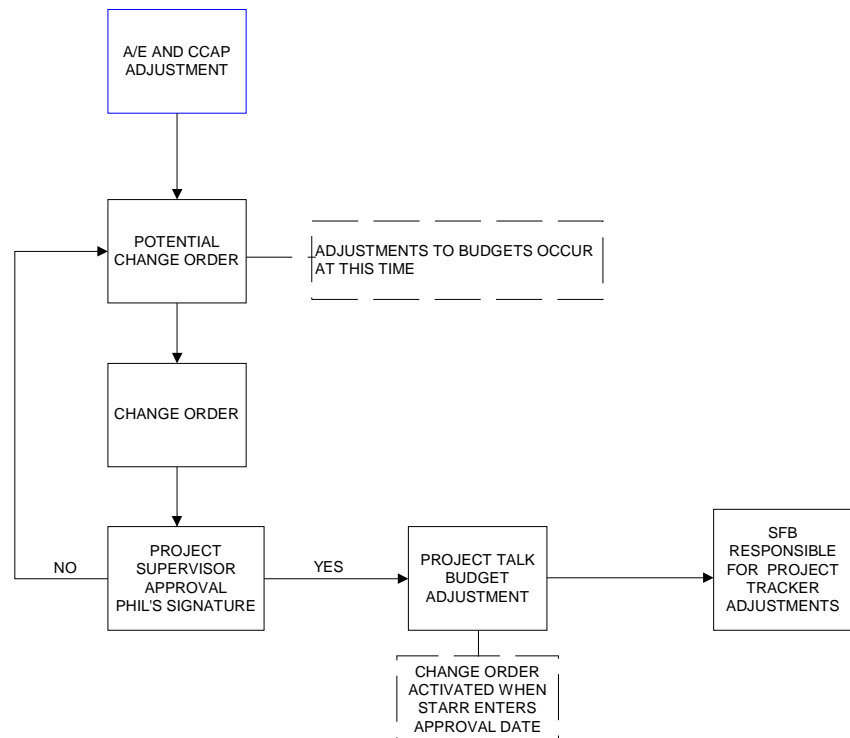
## E. Contingency Use (Budget Changes)

Contingency moves money within a project and within a project manager's letter package. Contingency may only move from budget code breakdown 6 (see Chapter 5 for an explanation of budget codes and associated breakdowns) to any line item breakdown within the project manager's letter package. There are three types of contingency uses within the ProjectTalk system:

- D.1 - Using contingency within a project
- D.2 - Using contingency within a bid package and/or a project manager's letter package
- D.3 - Using contingency added by the ASFB to the project manager's letter package



### Budget Changes (Contingency)



## Task E.1 Use of Contingency within a Project

Use of contingency within a project is used when:

1. The scheduled cost of a line item exceeds the budget amount.
2. The contingency line item budget within the project has adequate funds to cover the amount above.

### What do I do?

1. Click the **Cost Control** button on the Switchboard, and click **Potential Change Orders**

### What happens?/Comments



ProjectTalk opens the Potential Change Orders Form.

2. Fill out the **PCO** per the instructions in Section B. Each transaction will require two line items as shown in the example.

3. On the first row select the budget code for the project that requires additional budget funds and enter the amount in the **Contingency Use Amount** field.

This amount should be the difference between the contract amount and the budget amount.

4. On the second row select the contingency budget code for the same project and enter a deductive amount in the **Contingency Use Amount** field.

Steps 3 and 4 should equal a zero dollar transaction.



### What do I do?

5. In the **Budget Allocation** field select **Approved Revisions** for both of the transactions created in Steps 3 and 4.

### What happens?/Comments

Revisions	Budget Approved	Current Budget	Budget Pending	Budget
Revised	25,000.00	170,161.00	0.00	
Changes	25,000.00	0.00	0.00	

NOTE: Changing the allocation of any previously saved entries will reverse the previous budget line item adjustments prior to making any new adjustments.

Buttons: OK, Cancel, Apply

Selecting approved revisions will display the changes as approved budget changes and the budget reports will display the data accordingly.

6. In the **Cost Allocation** field select **No Cost Allocation** for both of the transactions created in Steps 3 and 4.

Revisions	Budget Approved	Current Budget	Budget Pending	Budget
Revised	25,000.00	170,161.00	0.00	
Changes	25,000.00	0.00	0.00	

NOTE: Changing the allocation of any previously saved entries will reverse the previous budget line item adjustments prior to making any new adjustments.

Buttons: OK, Cancel, Apply

7. Click Save.

## **Task E.1a Printing an a PCO and Viewing Budget Changes**

In this task, you will use Quick Print to print a report for the Contingency Use.

h

### What do I do?

1. With the PCO open, to print the report, click the **Quick Print** button on the toolbar.

### What happens?/Comment



Report Manager opens.

- [illegible]

- [illegible]

## Task E.2 Using Contingency within Bid & Letter Packages

Using contingency within a Project Manager's Bid or Letter Packages is used if:

1. The scheduled cost of a line item exceeds the budget amount.
2. The contingency line item budget within the project has additional funds but they are not adequate to cover the amount above.
3. One or more contingency line items within the bid or letter packages have adequate funds to cover the amount above.

### Clarification:

Contingency can be used from any project within the PM's letter package. Contingency may be used from other contingency line items within the PM's letter package even if funds are available within the bid package.

### What do I do?

1. Click the **Cost Control** button on the Switchboard, and click **Potential Change Orders**

### What happens?/Comments



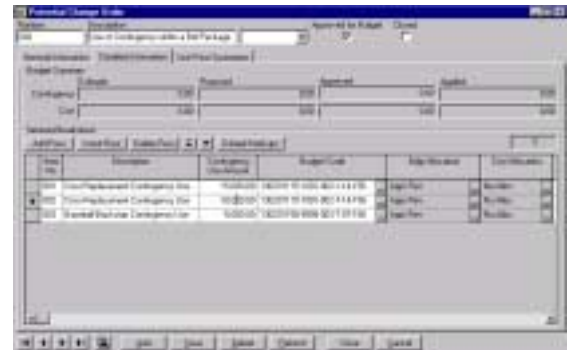
ProjectTalk opens the Potential Change Order Form.

A screenshot of the "Potential Change Order" form in ProjectTalk. The form has a title bar at the top. Below the title bar, there are several sections: "Project Information" with fields for "Project Number" and "Project Description"; "Change Order Information" with fields for "Change Order Number", "Change Order Description", and "Change Order Amount"; and "Approval Information" with fields for "Requested User", "Approved User", and "Approved Date". There are also checkboxes for "Is this a Budget Change?" and "Is this a Contingency Change?". At the bottom of the form, there are buttons for "Add", "Get", "Save", "Print", "Exit", and "Cancel".

### What do I do?

2. Fill out the **PCO** per the instructions in Section B.

### What happens?/Comments

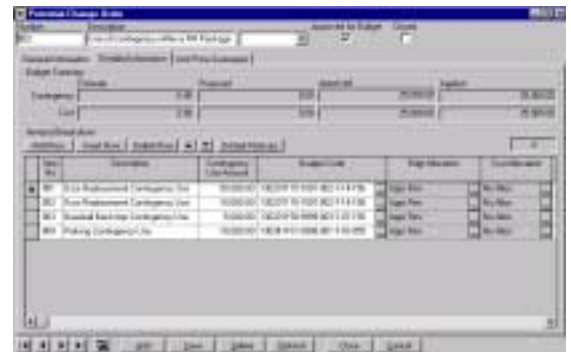


3. Add a row and select the budget code for the project that requires additional budget funds and enter the amount in the **Contingency Use Amount** field.
4. If funds are available in the contingency line item for the project, add a row and select the contingency budget code for the same project. Enter a deductive amount in the **Contingency Use Amount** field which equals the budget amount (or a portion of) for the contingency row.
5. If additional funds are required and are available within the **Bid Package** add a row and select the contingency budget code for a project. Enter a deductive amount in the **Contingency Use Amount** field which is equal to (or a portion of) the difference remaining after Step 4.

This amount should be the difference between the contract amount and the budget amount.

If there are no funds available this Step is skipped.

Step 5 will need to be repeated for each project within the **bid package** requiring additional funds.



If there are no funds available within the bid package this step is skipped.

### What do I do?

6. In the **Budget Allocation** field select **Approved Revisions** for all of the transactions created in Steps 3, 4 and 5.

### What happens?/Comments

**Specify Budget System Allocations for PCO Item**

**Budget Allocation** **Cost Allocation**

Specify Allocation for Budget Side:

- ☐ Approve Pending
- ☐ Pending Pending
- ☒ Approved Revisions
- ☐ No Budget Allocation
- ☐ Not Canceled

This option is typically used for anticipated items to credit cost that will not be properly budgeted funds. This allocation also can affect an approved budget. This allocation only affects the budget side that is, the budget between you and your client. This allocation is typically used when you do not want to show any amount in the proposed cost.

Revised	Budget Approved	Current Budget	Budget Pending	Budget
Revised	25,000.00	175,181.00	0.00	
Changes	25,000.00	0.00	0.00	

NOTE: Changing the allocation of any previously saved entries will reverse the previous budget line item adjustments prior to making any new adjustments.

OK Cancel Apply

Selecting approved revisions will display the changes as approved budget changes and the budget reports will display the data accordingly.

7. In the **Cost Allocation** field select **No Cost Allocation** for all of the transactions created in Steps 3, 4 and 5.

**Specify Budget System Allocations for PCO Item**

**Budget Allocation** **Cost Allocation**

Specify Allocation for Cost Side:

- ☐ Add to Approved Commitment
- ☐ Add to Pending Commitment
- ☐ Add to Uncommitted Cost
- ☐ Use Uncommitted Costs (Pending)
- ☐ Use Uncommitted Costs (Approved)
- ☒ No Cost Allocation
- ☐ Not Canceled

This option is typically used for anticipated items to credit cost that will not be properly budgeted funds. This allocation also can affect an approved budget. This allocation only affects the budget side that is, the budget between you and your client. This allocation is typically used when you do not want to show any amount in the proposed cost.

Revised	Budget Approved	Current Budget	Budget Pending	Budget
Revised	25,000.00	175,181.00	0.00	
Changes	25,000.00	0.00	0.00	

NOTE: Changing the allocation of any previously saved entries will reverse the previous budget line item adjustments prior to making any new adjustments.

OK Cancel Apply

8. Click Save.
9. If additional funds are required switch to the project from which you would like to take the contingency.
10. Create a **PCO** per the instructions in Section B. Reference the **PCO** created in Step 3.

**Tip:** If you return to the other package and enter the PCO number created in Step 8 you will have a reference for linking the two together.

### What do I do?

11. Add a row and select the contingency budget code for a project. Enter a deductive amount in the **Contingency Use Amount** field which is equal to (or a portion of) the difference remaining after Step 4.

12. In the **Budget Allocation** field select **Approved Revisions** for of the transaction(s) created in Steps 10 & 11.

13. In the **Cost Allocation** field select **No Cost Allocation** for of the transaction(s) created in Steps 10 & 11.

14. Click Save.

### What happens?/Comments

The screenshot shows a window titled 'Potential Change Table'. It contains a table with columns for 'Budget Code', 'Description', 'Budget Code', 'Budget Amount', and 'Total Amount'. The table has one row with the following data: 'Contingency Use Amount', '25,000.00', '25,000.00', and '25,000.00'. Below the table, there are buttons for 'OK', 'Cancel', and 'Apply'.

This step is repeated for projects within the same bid package.

The screenshot shows a window titled 'Specify Budget System Allocations for PCD Item'. It has a 'Budget Allocation' tab and a 'Cost Allocation' tab. Under 'Budget Allocation', the 'Approved Revisions' option is selected. A text box on the right explains that this option allocates the amount from the approved budget revisions to the budget code financial system. Below the tabs, there is a table with columns: 'Revisions', 'Budget Approved', 'Current Budget', 'Budget Pending', and 'Budget Total'. The table has two rows: 'Revised' with values 25,000.00, 175,151.90, 0.00, and 175,151.90; and 'Change' with values 25,000.00, 0.00, 0.00, and 0.00. At the bottom, there is a 'NOTE' and buttons for 'OK', 'Cancel', and 'Apply'.

Selecting approved revisions will display the changes as approved budget changes and the budget reports will display the data accordingly.

The screenshot shows a window titled 'Specify Budget System Allocations for PCD Item'. It has a 'Budget Allocation' tab and a 'Cost Allocation' tab. Under 'Cost Allocation', the 'No Cost Allocation' option is selected. A text box on the right explains that this option is typically used for anticipated items as it will not affect the budgeted amounts. Below the tabs, there is a table with columns: 'Revisions', 'Budget Approved', 'Current Budget', 'Budget Pending', and 'Budget Total'. The table has two rows: 'Revised' with values 25,000.00, 175,151.90, 0.00, and 175,151.90; and 'Change' with values 25,000.00, 0.00, 0.00, and 0.00. At the bottom, there is a 'NOTE' and buttons for 'OK', 'Cancel', and 'Apply'.

Steps 9, 10, 11 & 12 will need to be repeated for each bid package until the amount in Step 4 is satisfied.

## Task E.2a Printing an a PCO and Viewing Budget Changes

In this task, you will use Quick Print to print a report for the Contingency Shift.

### What do I do?

1. With the record open, to print the report, click the **Quick Print** button on the toolbar.
2. Select the **Potential Change Order** report.

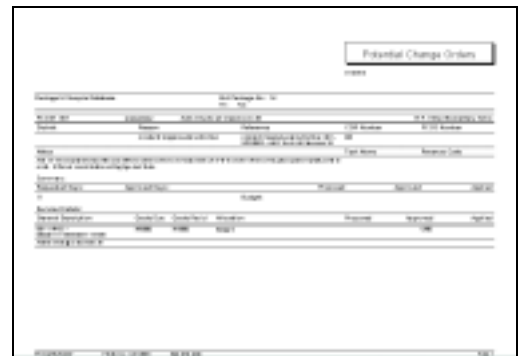
### What happens?/Comment



Report Manager opens.



3. Click the **Run** button.



4. **Close** the Preview and Report Manager windows.

### Task E.3 Using Contingency added to the PM's letter package by the ASFB

Using contingency from the Contingency account to bid packages is used when:

1. The scheduled cost of a line item exceeds the budget amount.
2. The contingency line item budget within the project does not have adequate funds to cover the above.
3. Contingency Line Items within the Letter Package do not have adequate funds to cover the above and sufficient funds have been requested by the PM, approved by the SFB and loaded into ProjectTalk. Each Letter Package has a ProjectTalk Bid Package allocated to contingency only, where the approved contingency funds will be loaded for Letter Package use.

#### What do I do?

1. In the project requiring additional funds, click the **Cost Control** button on the Switchboard, and click **Potential Change Orders**

#### What happens?/Comments



ProjectTalk opens the Potential Change Order Form.

2. Fill out the **PCO** per the instructions in Section B.
3. Add a row and select the budget code for the project that requires additional budget funds and enter the amount in the **Contingency Use Amount** field.

This may be repeated for multiple projects within the bid package.



### What do I do?

4. In the **Budget Allocation** field select **Approved Revisions** for the transactions created in Step 3 for each row.

### What happens?/Comments

Revisions	Budget Approved	Current Budget	Budget Pending	Budget J. 2
Revised	25,000.00	170,181.00	0.00	
Changes	25,000.00	0.00	0.00	

NOTE: Changing the allocation of any previously saved entries will reverse the previous budget line item adjustments prior to making any new adjustments.

Selecting approved revisions will display the changes as approved budget changes and the budget reports will display the data accordingly.

5. In the **Cost Allocation** field select **No Cost Allocation** for the transactions created in Step 3 for each row.

Revisions	Budget Approved	Current Budget	Budget Pending	Budget J. 2
Revised	25,000.00	170,181.00	0.00	
Changes	25,000.00	0.00	0.00	

NOTE: Changing the allocation of any previously saved entries will reverse the previous budget line item adjustments prior to making any new adjustments.

6. Click Save.
7. Using Portfolio Manager switch to the Project Manager's letter package contingency bid package.
8. Fill out the **PCO** per the instructions in Section B.

General Information

Item Name: [Field]

Item Code: [Field]

Item Description: [Field]

Item Category: [Field]

Item Subcategory: [Field]

Item Unit: [Field]

Item Quantity: [Field]

Item Price: [Field]

Item Total: [Field]

Item Status: [Field]

Item Date: [Field]

Item Location: [Field]

Item Notes: [Field]

Type a reference to the funded bid package and budget code in the notes field on the General Information tab.

### What do I do?

9. Add a row and select the contingency budget code for the project. Enter a deductive amount in the **Contingency Use Amount** field which equals the difference remaining after Step 3.
10. In the **Budget Allocation** field select **Approved Revisions** for the transaction created in Step 9.

### What happens?/Comments

Previous	Budget Approved	Current Budget	Budget Pending	Budget
Previous	25,000.00	115,911.00	0.00	
Change	25,000.00	0.00	0.00	

Selecting approved revisions will display the changes as approved budget changes and the budget reports will display the data accordingly.

11. In the **Cost Allocation** field select **No Cost Allocation** for the transaction created in Step 9.

Previous	Budget Approved	Current Budget	Budget Pending	Budget
Previous	25,000.00	115,911.00	0.00	
Change	25,000.00	0.00	0.00	

12. Click Save.

**Task E.4     Printing an a PCO and Viewing Budget Changes**

In this task, you will use Quick Print to print a report for the Contingency Use.

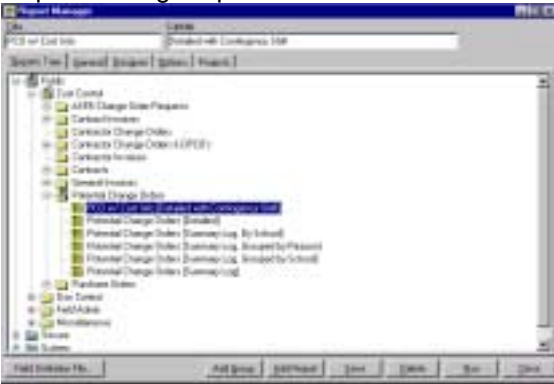
**What do I do?**

- 1. With the record open, to print the report, click the **Quick Print** button on the toolbar.

**What happens?/Comment**



Report Manager opens.



- 2. Select the **Potential Change Order** report.
- 3. Click the **Run** button.



- 4. **Close** the Preview and Report Manager windows.

# ***Reports***

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# Chapter 7

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## ARIZONA SCHOOL FACILITIES BOARD

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### Students FIRST Program

# INVOICING

### Chapter Description

ProjectTalk provides a method for processing the monthly billings to the ASFB for work completed. In the following section you will learn how to use ProjectTalk to create the monthly applications for payment from the Contractors and General Invoices to the ASFB. This section covers the following topic:

- A. Recording a Contract or A/E Invoice
- B. Recording a General Invoice



## A. Creating Contractor or A/E Invoices

### Task A.1 Creating Contractor or A/E Invoice to the ASFB

In this task, you will create an invoice for based on the contract with the ASFB.

#### What do I do?

1. Click the **Costs** button on the Switchboard, and click **Contractor and A/E Invoices**.

#### What happens?/Comments



The *Contractor and A/E Invoice* form opens.

 A screenshot of the "Contractor and A/E Invoice" form. The form has a title bar "Contractor and A/E Invoice" and a menu bar with "File", "Edit", "Format", "Tools", "Window", and "Help". Below the menu bar are several tabs: "General Information", "Contract Information", "Invoice Information", "Payment Information", "Tax Information", "Miscellaneous", and "Comments". The "General Information" tab is active. It contains fields for "Contract Number", "Invoice Number", "Invoice Date", "Period", and "Approved By". Below these fields is a table with columns: "Item No.", "Description", "Category", "Work Type", "Contract Value", "Invoice Amount", "Contracted Value", "Previous Work", and "Total Contracted". The table is currently empty. At the bottom of the form are buttons for "Add", "Edit", "Delete", "Print", "Refresh", and "Close".

2. In the **Contract Number** list, select the contract number from the drop down list.
3. In the **Invoice Date** field enter the date of the invoice.
4. In the **Period** list, select the current cost period.

ProjectTalk also automatically enters the number 1 into the Invoice No. field and Sequence field. This is the first contractor invoice for the contract. The invoice number may be modified to match the paper copy.

**Ctrl+D** will enter today's date.

Period	From	To
01	9/1/1999	9/30/1999
02	10/1/1999	10/31/1999
03	11/1/1999	11/30/1999

5. Click **Save**.




## Task A.2     Entering Payment Amounts

In this task, you will enter Work This Invoice amounts for the first item in the invoice.

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. On the <b>Itemized Breakdown tab</b> , for each item, in the <b>Work This Invoice Value</b> column, enter the amount.	Repeat this task for each line item which has an amount for the current period.
2. Scroll to the right until you can see the <b>Percent Complete</b> column.	Prolog Manager automatically calculates the percent complete by dividing the Work This Invoice Value by the Scheduled Value of the line item.
3. Click <b>Save</b> .	


### Task A.3 Including a Change Order in a Contractor or A/E Invoice

In this task, you will add the change order to the contractor invoice, and then you will enter the Work This Invoice value for the change order.

What do I do?	What happens?/Comments
1. On the <b>Itemized Breakdown tab</b> , click <b>Add CO</b> .	  The Select Contract Change Order dialog box opens. Notice that only contract change orders for the selected contract are listed.
2. Select the <b>CCO</b> and click <b>OK</b> .	Prolog Manager adds the change order name and number to the bottom of the Itemized Breakdown grid. Notice that the description also indicates the potential change order number and item number. Multiple items may be selected.
3. Enter the amount for this period in the <b>Work This Invoice Value</b> column.	You may also enter the percent complete.
4. Click <b>Save</b> .	

## Task A.4     Printing a Contractor or A/E Invoice

In this task, you will print a report for the contractor invoice.

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. Click <b>Quick Print</b> .	  Report Manager opens. Notice that the Contractor and A/E Invoice [cover sheet] report is selected.
2. Click <b>Run</b> .	Prolog Manager generates the report, and displays it in the Preview window.
3. When you are finished looking at the report, <b>close</b> the Preview window.	

## B. Creating General Invoices

In this set of tasks, you will create and print a General Invoice. Tracking of General Invoices is optional and not required by the ASFB. General Invoices are NOT electronically uploaded to the ASFB.

### Task A.1 Creating General Invoices to the ASFB

In this task, you will create a general invoice to the ASFB.


#### What do I do?

1. Click the **Cost Control** button on the Switchboard, and click **General invoices**

#### What Happens?/Comments



The *General Invoice* form opens.

A screenshot of the "General Invoice" form. The form has a title bar and several fields. On the left, there are fields for "From Company", "To Company", and "Invoice Number". On the right, there are fields for "Invoice Date", "Invoice Period", "Invoice Total", "Previous TTD Balance", and "Balance of TTD". The "Invoice Number" field is highlighted with a blue selection bar.

2. In the **From Company** list, select **Acme Construction**.
3. In the **Number** field, type: **001**
4. In the **Description** column, type: **Utilities**
5. In the **To Company** list, select **Arizona School Facilities Board**
6. In the **Invoice Date** field, press **CTRL+D**.
7. In the **Period** list, select the current cost period.

Prolog Manager enters today's date in the Invoice Date field.

Period	From	To
01	9/1/1999	9/30/1999
02	10/1/1999	10/31/1999
03	11/1/1999	11/30/1999

8. Click **Save**.


## Task A.2 Entering Payment Amounts

In this task, you will enter Subtotal amounts for the first two items in the general invoice.

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. On the <b>Items tab</b> , click add row twice	
2. On the first line, in the <b>Item No</b> field, type <b>001</b>	
3. On tem 001, in the <b>Quantity</b> field enter <b>1</b>	
4. In the <b>Description</b> field, type <b>Electric</b>	
5. In the <b>Unit Price</b> for the line item type <b>2000</b> .	
6. On the second line, in the <b>Item No</b> field, type <b>002</b>	
7. On tem 001, in the <b>Quantity</b> field enter <b>1</b>	
8. In the <b>Description</b> field, type <b>Water</b>	
9. In the <b>Unit Price</b> for the line item type <b>3000</b> .	
10. Click <b>Save</b> .	

## Task A.4 Printing a General Invoice

In this task, you will print a report for the general invoice.

<i>What do I do?</i>	<i>What happens?/Comments</i>
1. Click <b>Quick Print</b> .	 Report Manager opens. Notice that the General Invoice [Detailed] report is selected.
2. Click <b>Run</b> .	Prolog Manager generates the report, and displays it in the Preview window.
3. When you are finished looking at the report, close the Preview window.	

# ***Reports***

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# ***Chapter 8***

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## **ARIZONA SCHOOL FACILITIES BOARD**

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### **Students FIRST Program**

# **CM AT RISK**

#### Chapter Description

- A. Creating a Prime Contract
- B. Creating a Prime Contract Change Order
- C. Creating an Application for Payment





## A. Recording a Prime Contract

One of the first contracts you will want to create using Prolog Manager is the prime contract in the CM at Risk contracting scenario. The prime contract establishes the agreement between your company and the ASFB. By creating a prime contract record in Prolog Manager, you will be able to create the prime contract, create and track prime contract change orders and applications for payment. In this series of tasks, you will enter the general information for the prime contract, and create the schedule of values.

### Task A.1 Entering a Prime Contract

You will create a contract with the ASFB.

#### What do I do?

1. Click the **Costs** button on the Switchboard, and click **Contracts**.

#### What happens?/Comments



Prolog Manager opens the *Contracts* form.



2. In the **Contract Number** field, type: **2001-ACC**
3. In the **To Company** field, use the pick list and choose: **Acme Construction**
4. In the **Short Description** field, type: **ASFB Prime Contract.**
5. In the **Type of Contract** field, select **Prime Contract.**
6. Leave the **Rules** field set to **Controlled Total.**
7. In the **Scope of Work** field, type: **New School**

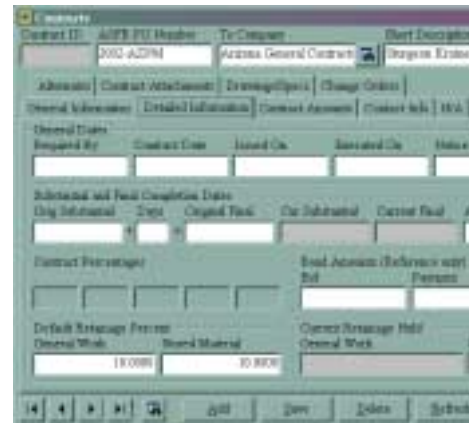
Press the TAB key to move from one field to the next.

Click to view a list of contract types.

### What do I do?

8. Click the **Detailed Information** tab.
9. Under **General Dates**, in the **Contract Date** field, press **1**. Then press the **TAB** key.
10. In the **Issued on Date** field, **CTRL+D**
11. You can type dates in the Executed On, Notice to Proceed and Actual Start fields as the dates become available.  
For this exercise, leave these fields blank.
12. Under **Substantial and Final Completion Dates**, in the **Orig Substantial** field, type: **5/1/02**
13. In the **Days** field, type: **30**
14. Press the **TAB** key.
15. Click **Save**.

### What happens?/Comments



When you press the TAB key, Prolog Manager automatically assigns the value in the Contract Date field as the day of the current month, adding the month and year numbers for you.

Prolog Manager enters today's date in the Issued on Date field.

The original substantial completion date is the date by which the work in the contract is expected to be substantially completed. The ASFB expects to move in and begin using the school by the original substantial date.

The number in the Days field represents the number of days after the original substantial completion date that you have to complete the work in the contract.

Prolog Manager automatically enters 5/31/2002 in the Original Final field. Prolog Manager calculates the Original Final date by adding 30 days to the Orig Substantial date. Prolog Manager days are based on calendar, not work days.

## Task A.2 Entering the Schedule of Values for a Prime Contract

On the Contract Amounts tab, you will enter the schedule of values to indicate the cost breakdown of the contract. These schedule of value line items will appear on the application for payment as well. For this exercise, we will only enter two schedule of value line items.

### What do I do?

1. Click the **Contract Amounts** tab.
2. Click the **Add Row** button.

### What happens?/Comments



Prolog Manager adds a row to the Schedule of Values grid, and automatically assigns the next sequential number to the row.

3. In the **Description** column, type:  
**General Conditions**
4. In the **Scheduled Cost** column, type:  
**2,100,000.00**
5. **Repeat steps 2-4** for the second schedule of values item:

Item No	Description	Scheduled Cost
2	Sitework	3,500,000.00

6. Click **Save**.

Notice that the total of the items appears in the Sum of Items field above the grid. The field is gray to indicate that the value is not editable.

## Task A.3 Generating a Contract using PM Writer

Now that you have identified the items in the contract, and indicated the company you want to perform the work, you can generate a contract for signature by the ASFB. You will use a PM Writer template to generate the contract.

### What do I do?

1. Click the **Link PM Writer Document** button on the toolbar.

### What happens?/Comments



Prolog Manager opens the Create Linked Letters with a PM Writer Template dialog box. Notice that Prolog Manager only displays templates used with potential change orders.


2. In the Template Title column, select **ASFB-CM at Risk Agreement**.
3. Click **Proceed**.

Prolog Manager opens the Contact Pick List.

<u>What do I do?</u>	<u>What happens?/Comments</u>
4. Click <b>OK</b> .	Prolog Manager opens the PM Writer Documents window and generates a Contractor Agreement to Acme Construction.
5. Click <b>Save</b> in the PM Writer Documents window.	The contract to Acme Construction is linked to the contract record.
6. Click <b>Close</b> .	Prolog Manager closes the PM Writer Documents window and returns you to the Contracts form.

## Task A.4 Printing a Contract Report

In this task, you will use Quick Print to print a report for the contracts.

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. To print the report, click the <b>Quick Print</b> button on the toolbar.	 <p>Report Manager opens.</p>
2. Select the <b>Contracts (Detailed, Grouped by Contract Number)</b> report.	
3. Click the <b>Run</b> button.	
4. <b>Close</b> the Preview and Report Manager windows.	

## B. Creating a Prime Contract Change Order

Once you have a Change Order Request approved you will need to create a Prime Contract Change Order with the ASFB.

In this example we want to demonstrate how Prolog can link PCO's into a Prime Contract Change Order. We will link the PCO we created in the PCO section.

### Task B.1 Creating a Prime Contract Change Order


#### What do I do?

1. Click the **Cost Control** button on the Switchboard, and click **Prime Contract Change Orders**.

#### What happens?/Comments



Prolog Manager opens the Prime Contract Change Orders form.

A screenshot of the "Prime Contract Change Orders" form in Prolog Manager. The form has a title bar and a menu bar. It contains several input fields for "Contract Number", "Description", "Date", "Approved Amount", and "Approved Date". There are also buttons for "Add Line", "Delete Line", "Insert Line", and "Clear Line". A table with columns for "Line Item", "Description", "Unit", "Quantity", "Unit Price", "Total Amount", "Tax", "Total", and "Status" is visible at the bottom. The form is set against a light blue background with a grid pattern.

2. In the **Contract Number** list, select 2001-ACC
3. In the **Description** field, type: **Changes Approved this Month.**
4. In the **Date** field, press **CTRL+D** .
5. Click **Save**.


This is the first PCCO logged into Prolog Manager.

For a real project you would be more date specific.

Prolog Manager enters today's date in the Date field.

**Task B.2      Linking an Approved ASFB Change Order Request**

A prime contract change order is made up of one or more approved change order requests. In this task, you will link the change order request no.: 1 to the prime contract change order.

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. Click the <b>Add Via COR</b> button.	  The Select Change Order Request form appears. All of the COR's shown on this list have not been linked to a Prime Contract Change Order yet.
2. Select <b>COR Number 001</b> , then click <b>OK</b> .	Prolog Manager adds COR 001 to the grid on the General Information tab.
3. Look at the <b>Approved Amount</b> field.	Notice that the COR total amount automatically appears.
4. In the <b>Approved Days</b> field, type <b>2</b> .	The owner has approved two additional days for working on the change order.
5. Click <b>Save</b> .	

### **Task B.3     Printing the Prime Contract Change Order**

<b><u>What do I do?</u></b>	<b><u>What happens?/Comments</u></b>
1. On the reports tree, select the Prime Contract Change Order (Detailed) report.	
2. Click the Run button.	
3. Close the Preview and Report Manager windows.	





## C. Using the Application for Payment Form

In this set of tasks, you will create and print an application for payment to be submitted to the ASFB.

### Task C.1 Creating an Application for Payment to the ASFB

In this task, you will create an application for payment based on your prime contract with the ASFB.

What to do	Results/Comments
1. Click the Costs button on the Switchboard, and click Application for Payment.	 The icon shows a yellow square with a stack of papers and the text "Cost Control" below it.
	The <i>Application for Payment</i> form opens.
	 A screenshot of the "Application for Payment" form. It has a title bar and several tabs: "Application No.", "Sequence", "App Date", "Period", "Contract Label", and "Print". Below the tabs are fields for "Contract Number", "Application No.", "Sequence", "App Date", "Period", "Contract Label", and "Print". There are also buttons for "Add New", "Add To", "Open File", "Save", "Print", "Close", and "Cancel".
2. In the Contract Number list, select 2001-ACC	Prolog Manager also automatically enters the number 1 into the Application No. field and Sequence field. This is the first application for payment for the contract.
3. In the App Date field, press CTRL+D .	Prolog Manager enters today's date in the App Date field.
4. In the Period list, select the current cost period.	
5. Click Save.	


## Task C.2 Entering Payment Amounts

In this task, you will enter Work This Invoice amounts for the first two items in the application for payment.

	What to do	Results/Comments
1.	On the <b>Itemized Breakdown</b> tab, for Item 001, General Conditions, in the <b>Work This Invoice Value</b> column, type: <b>345,000</b>	
2.	Scroll to the right until you can see the <b>Percent Complete</b> column.	Prolog Manager automatically calculates the percent complete by dividing the Work This Invoice Value by the Scheduled Value of the line item.
3.	For Item 002, Sitework, in the <b>Percent Complete</b> column, type: <b>75</b>	The work for this line item is 75% complete.
4.	Scroll to the left until you can see the <b>Work This Invoice Value</b> column.	Prolog Manager automatically calculates the Work This Invoice Value by multiplying the Percent Complete by the Scheduled Value of the line item.
5.	Click <b>Save</b> .	


### Task C.3 Including a Change Order in an Application for Payment

The application for payment includes work completed as a result of Prime Contract Change Order 001, "COR #001" In this task, you will add the change order to the application for payment, and then you will enter the Work This Invoice value for the change order.

What to do	Results/Comments
1. On the Itemized Breakdown tab, click Add CO.	  The Select Prime Contract Change Order dialog box opens. Notice that only prime contract change orders for Contract 2001-AZPM are listed.
2. Select PCCO Number 001, and click OK.	Prolog Manager adds the change order name and number to the bottom of the Itemized Breakdown grid. Notice that the description also indicates the potential change order number and item number.
3. For PCCO No. 001, In the Percent Complete column, type: 50	Work for the change order is 50% complete.
4. Scroll to the left until you can see the Work This Invoice Value column.	Prolog Manager automatically calculates the Work This Invoice Value by multiplying the Percent Complete by the Scheduled Value of the line item.
5. Click Save.	

## Task C.4     Printing a Payment Application

In this task, you will print a report for the application for payment.

What to do	Results/Comments
1. Click Quick Print.	  Report Manager opens. Notice that the Application for Payment Detailed, Grouped by Each Number report is selected.
2. In Report Manager, select Application for Payment Detailed Sheet.	
3. Click Run.	Prolog Manager generates the report, and displays it in the Preview window.
4. When you are finished looking at the report, close the Preview window.	



# ***Reports***

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# Chapter 9

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## ARIZONA SCHOOL FACILITIES BOARD Students FIRST Program

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# DOCUMENT CONTROL

### Chapter Description

In this Chapter, you will create drawing and specification records and compile drawings into drawing packages. You will also create a request for information record, submittal packages, and submittal items. In addition, you will create an issue, create and update meeting minutes and enter information in the closeout and conversation logs.

- a. Processing Requests for Information
- b. Logging Items in Submittal Register
- c. Creating Submittal Packages
- d. Creating Drawing or Specification Logs
- e. Creating Drawing packages
- f. Updating Multiple Drawings and Specifications
- g. Creating Issues
- h. Using Conversation Log



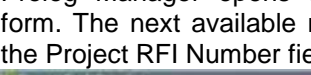


### A. Processing Requests for Information

You can use the *Request For Information* form to request information from another party, such as the architect, owner or general contractor, about your project. The form can be used to track a question from initiation to resolution.

## Task A.1 Logging a Request for Information

In this task, you have received a structural request for information (RFI) from Four State Contracting, a general contractor. This request for information needs to be logged in the *Request For Information* form. You need to enter information about the subject of the RFI and decide if the RFI is official.

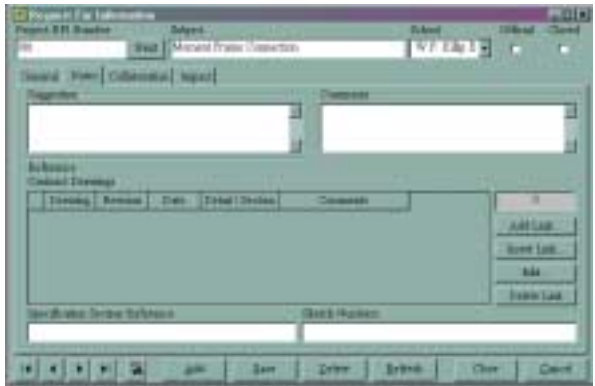
What do I do?	What happens?/Comments
1. On the Switchboard, click the <b>Doc Control</b> button, and click <b>Request For Information</b> .	 <p>Prolog Manager opens the <i>Request For Information</i> form. The next available record number is displayed in the Project RFI Number field.</p>
2. In the <b>Subject</b> field, type: <b>Moment Frame Connection</b>	
3. Select the <b>Official</b> check box.	A check mark is displayed in the box, indicating that the RFI is official for the project.
Skip the <b>Closed</b> check box until all issues concerning the RFI are completed.	
4. On the <b>General</b> tab, in the <b>Date Created</b> field, press <b>CTRL+D</b> , then press the <b>TAB</b> key.	Prolog Manager enters today's date in the Date Created field, and displays the date one week from today in the Date Required field.
5. Click the arrow next to the <b>Discipline</b> list, and select <b>Structural</b> .	
6. In the <b>Category</b> list, select <b>Specification Clarification</b> .	

<b>Tip</b>	The “official” checkbox can be used in several different ways. In most cases, the box will be selected if this is an RFI that will need to be forwarded to a third party for answer or clarification. If you are not sure if the request for information needs to be categorized as official, you can delete the number in the Project RFI Number field. You can type a number in the field at any time if the RFI becomes an official project RFI.
------------	---

## Task A.2 Entering Question Information

On the General tab, you need to enter information about the company originating the RFI. In this example, the company will be a general contractor.

- | <u>What do I do?</u>   | <u>What happens?/Comments</u>  |
|--|--|
| 1. In the <b>Author Company</b> field, type <b>FOURST</b> and hit the <b>Tab</b> key.                        | <b>Four State Contracting</b> will appear in the Author Company Field.         |
| 2. In the <b>Authored by</b> field, <b>Doug Douglas</b> , the main contact, is automatically entered.        | If you need to change the contact, use the pick list button to choose another. |
| 3. In the <b>Author RFI Number</b> field, Type <b>FS-001</b> .   | This is the RFI numbering system that the author uses.                         |
| 4. In the <b>Answer Company</b> field, use the pick list button to select: <b>Valley Architects</b>          |  |
| 5. In the <b>Question</b> field, type: <b>This moment frame connection detail is not up to current code.</b> |  |
| 6. Click the <b>Notes</b> tab.   |  |
- 
7. In the **Suggestion** field, type: **See attached '99 code revision.**



### Task A.3 Linking Drawings and Specifications to an RFI

An RFI may impact the drawings for your project. You can link an RFI to one or many drawing records. In this task, you will link the Moment Frame Connection RFI to the latest drawing revisions for drawing S4.1.

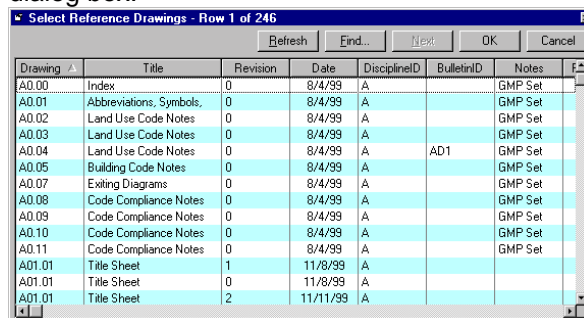
#### What do I do?

1. On the **Notes** tab, under **Reference**, click **Add Link**.

#### What happens?/Comments

**Add Link...**

Prolog Manager opens the Select Reference Drawings dialog box.



2. Select **S4.1 – Revision 1** from the list and click **OK**.

You can select more than one drawing at a time by pressing the CTRL key while clicking the mouse. Prolog Manager closes the Select Reference Drawings dialog box and displays each drawing as a row in the Referenced Drawings grid.
3. Click **Save**.

When you save your changes, Prolog Manager automatically updates the RFI Reference column on the Actual Documents tab of the affected Drawings and Specifications records.

## Task A.4 How Do I Use Collaboration Information in a Request for Information?

The Collaboration grid on the Collaboration tab enables you to track the progression of the request for information. In this task, you need to create entries in the collaboration grid to track that a request for information was sent to you by Frank Lank Construction. You will also log information in the grid for forwarding the request for information to the architect, Jessup Owens Fredericks Company, and for sending a courtesy copy to Pomeroy Engineering, the structural engineer.

### What do I do?

### What happens?/Comments

1. Click the **Collaboration** tab

2. Under Collaboration, click **Add Row**



A new row appears in the **Collaboration** grid.

3. In the **From Contact** column, type: **Doug Douglas**

Four State Contracting appears in the From Company column.

Doug Douglas is the contact for Four Star Contracting who sent you the request for information.

4. In the **To Company** column, type: **ACC**

ACC is the company code for Acme Construction Management, the company who received the request for information.

5. In the **To Contact** field, your name appears.

You set yourself up as the main contact for Acme Construction Management.

6. In the **Date Received** column, press **CTRL+D**.

Today's date appears in the Date Received field.




7. In the **Sent For** column, select **Review**

8. In the **Sent Via** column, select **Fax**

9. Click **Save**.

**Task A.5     How do I Forward the Request for Information to the Architect?**

Now that you have logged the request for information as received from the general contractor, you will create an entry to officially log that the RFI is being forwarded to the architect.

- | <u>What do I do?</u>  | <u>What happens?/Comments</u>   |
|---|---|
| 1. Under <b>Collaboration</b> , click <b>Add Row</b>                    | <br><br>A new row appears in the Collaboration grid.                            |
| 2. In the <b>From Company</b> column, type: <b>ACC</b> . Hit TAB        | <b>Acme Construction</b> automatically appears in the <b>From Company</b> column, and your name appears in the <b>From Contact</b> field.                         |
| 3. Click the <b>Lookup</b> button next to the <b>To Contact</b> column. | <br><br>The <b>Contact Pick List</b> appears:                                    |
|   |    |
| 4. In the <b>Contact Pick List</b> , select <b>Debbie Duncan</b>        | To select a contact from this list, double click the button next to the name on the extreme left. The name of the selected individual appears in the bottom grid. |
| 5. Click <b>OK</b>  | <b>Contact Pick List</b> closes and <b>Debbie Duncan</b> appears in the <b>To Contact</b> column and <b>Valley Architects</b> . in the <b>To Company</b> column.  |
| 6. In the <b>Date Sent</b> column, press <b>CTRL+D</b>                  | Today's date appears in the Date Sent field.  |
| 7. Click the check box in the <b>Action</b> column                      | You need a response from Debbie Duncan regarding this request for information.  |

### What do I do?

### What happens?/Comments

8. Select the check box in the **Dunning Letter** column.
9. In the **Sent For** column, type **Answer**
10. In the **Sent Via** column, type **Fax**
11. Click **Save**
12. Click the **Notification Wizard** button

You can run a query that provides you with a list of all late RFI responses. If Debbie Duncan's response is late and if you selected the check box in the Dunning Letter column, the RFI will appear in the query results.

Notification Wizard...

The Notification Wizard opens to allow you to notify Debbie Duncan, via email, that there is an RFI that requires her attention.



13. Click **Next**
14. Click **Finish**

Step 2 of the Wizard opens asking you to confirm that you want to send notification to Debbie Duncan.

The Notification Wizard will send an email to Debbie Duncan asking her to log on to ProjectTalk to view an RFI that requires her attention.

---

**A Cool Tool:** To find an entry in a long pick list, click the header of the column for which you know the item's entry and start to type that entry. For example, in the just concluded search for Kevin Tillman, click the title of the **Contact ID** column and then type **ke**. Kevin Tillman is selected.

---

## Task A.6      How Do I Preview a Request for Information Report?

You can preview all the information you have entered in the **Request For Information** form in the **Print Preview** window of **Report Manager**.

### What do I do?

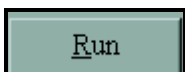
1. With the **Request For Information** record open, click **Quick Print** on the toolbar.

### What happens?/Comments



**Report Manager** opens and automatically selects the **Request for Information** report.

2. Click **Run**



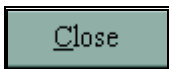
The report appears in the Preview Window.



3. Close the **Preview** window by clicking the **X** in the upper right hand corner of the preview screen.

The preview window closes and brings you back to the **Report Manager**

4. Click **Close**



**Report Manager** closes and you are brought back to your **Request for Information**.



## Task A.7 How Does Answer Information Get Entered?

Architects working with the SFB will have the ability to answer this RFI via ProjectTalk. Once answered online, you will be able to open the RFI and view their answer. However, if the respondent does not, for some reason, have access to ProjectTalk, you can also enter the answer information in the RFI as you will do in this task.

### What do I do?

1. On the **Request for Information**, click the **General** tab.

### What happens?/Comments




2. In the **Date Answered** field, press **CTRL+D**. . Prolog Manager enters today's date in the **Date Answered** field.
3. In the **Answer** field, type: **Use attached '99 code revision**
4. Click **Save**. If necessary, you can print a copy of the completed RFI for distribution or filing.

---

**Tip** You can use the Courtesy copies fields located on the Collaboration Tab to track distribution of the RFI question and answer to subcontractors.

---

---

**A Cool Tool:**  If you want to create a **Potential Change Order** based this **RFI**, simply click the **Create PCO** button the toolbar. A PCO is created based on the opened RFI.

---

## B. Logging Items in the Submittal Register

The **Submittal Register** form enables you to create a list of every submittal required by the project specifications. This list can be completed at the beginning of the project to create an anticipated submittal log or you can create submittal register records as each submittal package is received. In this set of tasks, you will create three separate entries for each part of the ceramic tile requirements – one for the required product data, one for the samples needed and one for the associated shop drawings.

### Task B.1: How Do I Create an Item in the Submittal Register?

In this task, you will create a submittal register record for the ceramic tile product data. You are assigning the ceramic tile submittal items to Tempe Builders, a general contractor. You will enter information for the tile requirements, such as the specification section and subsection, a description of and notes about the submittal item, and the company and person responsible for providing the item.

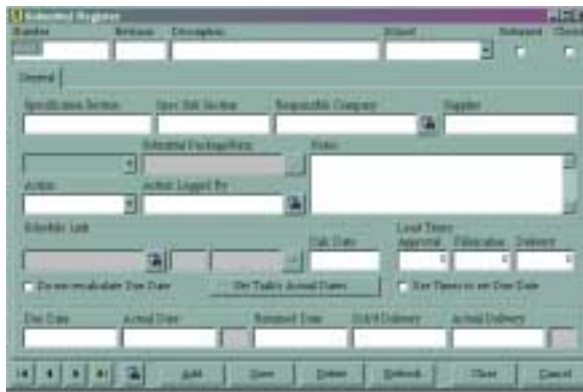
#### What do I do?

1. On the Switchboard, click the **Doc Control** button and click **Submittal Register**.

#### What happens?/Comments



The Submittal Register form appears with the next available record number displayed in the Number field.

A screenshot of the 'Submittal Register' form. The form has a title bar 'Submittal Register' and a menu bar with 'File', 'Edit', 'Format', 'Tools', 'Window', and 'Help'. Below the menu bar are several tabs: 'General', 'Description', 'Schedule', 'Status', 'Submittal', and 'History'. The 'General' tab is active. It contains fields for 'Number' (with a dropdown arrow), 'Specification Section', 'Spec Sub Section', 'Responsible Company', and 'Supplier'. Below these are 'Submittal Description' and 'Notes' fields. There are also 'Action' and 'Action Logged By' fields. At the bottom, there are checkboxes for 'Show submittal Date Date', 'Use Task's Actual Dates', and 'Use Dates on an Item Date'. The bottom of the form has a grid with columns for 'Due Date', 'Actual Date', 'Resubmit Date', 'Submittal Delivery', and 'Actual Delivery'. At the very bottom are buttons for 'Add', 'Open', 'Print', 'Refresh', 'Clear', and 'Cancel'.

2. In the **Revision** field, type: **0**
3. In the **Description** field, type: **Ceramic Tile Product Data.**
4. On the **General** tab, in the **Specification Section** field, type: **09310**

The 0 indicates this is the first draft of the submittal register item.

This is the Spec Section for ceramic tile

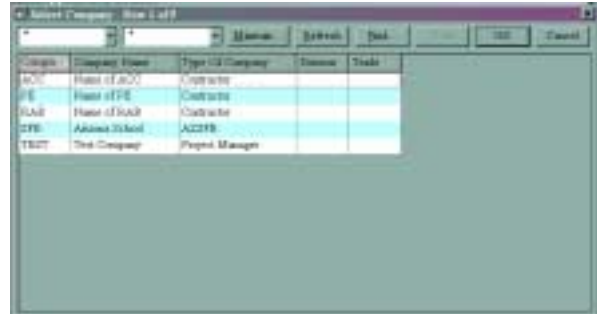
### What do I do?

5. Click the **Lookup** button next to the **Responsible Company** field

### What happens?/Comments



The Select Company dialog appears:



6. In the **Select Company** dialog, select **Tempe Builders**
7. Click **OK**.
8. In the **Notes** field, type: **3 copies of each are required**
9. Click **Save**.

The **Select Company** dialog closes and Tempe Builders, the company responsible for completing the submittal requirements, appears in the **Responsible Company** field.

## **Task B.2: How Do I Set the Due Date for a Submittal Item?**

In this task, you will use dates from tasks in an external schedule to set the due date for the Ceramic Tile submittal item.

### What do I do?

1. In the **Calc Date** field, type **9/25/01**
2. Under **Lead Times**, in the **Approval** field, type: **30**
3. In the **Fabrication** field, type: **30**
4. In the **Delivery** field, type: **30**

### What happens?/Comments



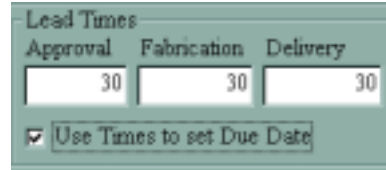
Because extra time is needed for the approval, fabrication and delivery of the ceramic tile, add lead-time into the submittal item due date to maintain the overall project schedule.

#### What do I do?

5. Check **Use Times to set Due Date**.

#### What happens?/Comments

This check indicates you want to include the lead times you entered in the **Approval**, **Fabrication** and **Delivery** fields in the due date calculation.



Note that the **Due Date** has now been reset.

6. Click **Save**

Keep the record open for the next task

### **Task B.3 How do I Create a Submittal Item from an Existing Submittal Register Record?**

After creating the **Product Data** record for ceramic tile, you need to create records for the ceramic tile samples and shop drawings. Because all of the ceramic tile entries have the same due date and requirement information, you can use the information in the **Ceramic Tile Product Data** record as the basis for other records and save data entry time.

#### What do I do?

1. With the **Ceramic Tile Product Data** record open in the **Submittal Register** form, in the **Number** field, type the next record number.
2. Press the TAB key
3. Click **Yes**
4. Delete the text in the **Description** field, and type: **Ceramic Tile Samples**
5. Click **Save**
6. Repeat steps 1-5, but for step 4, this time type: **Ceramic Tile Shop Drawings**.

#### What happens?/Comments

For example, if the number for the Ceramic Tile Product Data record is **0001**, type in **0002**.

A message asks you if you would like to create a new record with the current screen information.

A new record appears. The **Ceramic Tile Product Data** record is NOT overwritten.

## Task B.4 How Do I Print a Submittal Register Log?

Now that you've created Product Data records for the ceramic tile, you can generate a Submittal Register report that includes the records you've created.

## What do I do?

1. On the toolbar, click **Report Manager**



### What happens?/Comments

The **Report Manager** opens

2. In the **Report Tree**, click **Public**.
3. Click **Doc Control**
4. Click **Submittal Packages**

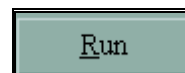
The main report types expand beneath **Public**

The report types expand beneath **Doc Control**

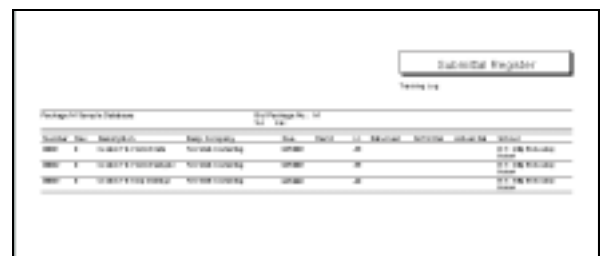
The list of individual **Submittal** reports appears:



5. Select **Submittal Register [Tracking Log]**.
6. Click **Run**



The report appears.

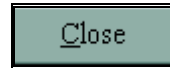


7. To close the report view, click **Close**.

**What do I do?**

**What happens?/Comments**

8. To close the Report Manager, click **Close**



---

**Note:** Much of the Submittal Register information that we have just entered could have been easily entered directly by the GC through ProjectTalk if they have been granted access to do so.

---

## C. Creating Submittal Packages

When you receive submittal items from a subcontractor, you can prepare a submittal package to send to the project architect or consultant for review. In this set of tasks, you will create a record for a ceramic tile submittal package prepared by Tempe Builders. The submittal package also needs to be forwarded to Valley Architects, the architectural firm, for review.

---

**Note:** Each submittal register item can only be linked to one submittal package at a time.

---

### Task C.1 How Do I Create Submittal Package Records?

In this task, you will create a submittal package for the submittal items you created in Tasks F.1-F.3.

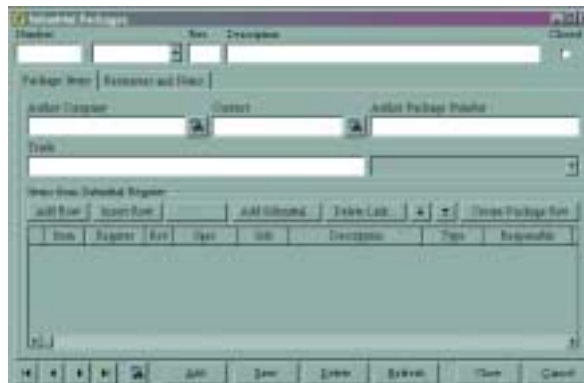
#### What do I do?

1. On the **Switchboard**, click the **Doc Control** button, and in the menu, click **Submittal Packages**.

#### What happens?/Comments



The Submittal Packages form appears:



2. In the first **Number** field, type: **001**.
3. In the second **Number** field, type: **09310**
4. In the **Rev** field, type: **0**
5. In the **Description** field, type: **Ceramic Tile Product Data, Samples and Shop Drawings**.
6. Click **Save**.

The number in the second Number field represents the **CSI Code** for Ceramic Tile. Ceramic Tile appears in the **Trade** field on the Package Items tab.

The **0** in the **Rev** (Revision) field indicates that you are entering a new submittal package.

## Task C.2    How Do I Enter Author Information for a Submittal Package?

Once you create the Submittal Packages record, you need to add information about the company that prepared the package.

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. On the <b>Package Items tab</b> of the <b>Submittal Packages</b> form, in the <b>Author Company</b> field, type: <b>TEMBUIL</b>	
2. Press the TAB key	Tempe Builders, the contractor appears in place of its code TEMBUIL.
3. In the <b>Author Package Number</b> field type: <b>TEM-001</b>	TEM-001 is the number Tempe Builders assigned to the submittal package.
4. Click <b>Save</b> .	Leave the record open for the next task.



## Task C.3 How Do I link Submittal Items to a Submittal Package?

### What do I do?

1. On the Package items tab, under Items from Submittal Register, click Add Submittal

### What happens?/Comments

Add Submittal...

The Select Submittal Register dialog appears:



2. In the **Select Submittal** register dialog, select Register No. **001**, **002**, and **003**

To select more than one row, press the CTRL key while clicking each row.

**Note:** Only Submittal Register items not yet tied to a submittal package appear in this list.

3. Click **OK**

The **Select Submittal Register** dialog closes and displays each submittal item as a row in the **Package Items** grid:



4. For each submittal item, in the **Recd. On** column, press **CTRL + D**
5. Click **Save**

## Task C.4 How Do I Enter Submittal Package Reviewer Information?

The submittal package is being sent to Valley Architects for review. In this task, you will enter information for the submittal package reviewer, Debbie Duncan, and when and how it was delivered to her.

### What do I do?

1. On the Submittal Packages form, click the Reviewers and Notes tab.

### What happens?/Comments

2. Under Package Reviewers, click Add Row.



A new row appears in the **Package Reviewers** grid.

3. In the **From Company** column, type: **ACC**

ACC is the company code for Acme Construction.

The **From Contact** column should display your name, as you are sending the package.

4. In the **To Company** field type **VALARCH**

VALARCH is the code for Valley Architects

5. Press TAB

**Valley Architects** is spelled out in the **To Company** field and **Debbie Duncan** appears as the **To Contact**.

6. In the **Sent Date** column, press CTRL + D.

Today's date appears in the **Sent Date** column.

The date two weeks from today is displayed in the **Due Date** column. This represents the number of days the review has to return a submittal package.

7. Click in the **Sent For** column and select **Approval**.

8. Click the arrow in the **Sent Via** column, and select **Federal Express**.

9. Check the box in the **Action Req'd** column.

Acme Construction is required to follow up on the submittal

10. Click **Save**

Leave the record open for the next task.

## Task C.5 How Do I Create a Submittal Transmittal?

You can create a submittal transmittal to send with the Ceramic Tile submittal package. Because you will create the transmittal while the Submittal Package record is open, the submittal package information appears automatically on the submittal transmittal.

---

**Note:** When you create a **Submittal Transmittal**, you must decide whether it is directed to the **Author Company** or the **Reviewer**. If it goes to the **Author Company**, make sure the **Package Items** tab is open. If it is to the **To Company**, make sure the **Reviewers and Notes** tab is open.

---

### What do I do?

1. With the **Submittal Packages** form open, on the **Tools** menu, click **Submittal Transmittal**.

### What happens?/Comments

The Submittal Transmittal form appears with the information you entered in the Submittal Packages form displayed in the fields of the Submittal Transmittal record.

2. In the **Date** field, press **CTRL + D** Today's date appears in the **Date** field.
3. On the **General** tab, under **Details** in the **Package Quantity** field, type: **1**.
4. In the **Transmitted For** list, select **Approval**.
5. In the **Delivered Via** list, select **Federal Express**.
6. In the **Tracking Number** column, type: **9087-65-321** This represents the Federal Express package tracking number.

### What do I do?

7. Click the **Detailed Items** tab

### What happens?/Comments



8. In the **Quantity** column, for each row, type: **3**

Three copies of each submittal item are being sent.

9. Click **Save**

10. Click **Quick Print**



The **Report Manager** appears with the **Submittal Transmittal [Detailed]** report selected.

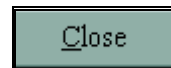
11. Double-click **Submittal Transmittal [Detailed]**

The report appears with the information you entered in the **Submittal Packages** form displayed in the report.



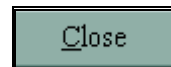
12. Click **Close Report**

13. Click the **Close** button to close the **Report Manager**.



The Submittal Transmittal is visible.

14. Click the **Close** button to close the **Submittal Transmittal**.



The **Submittal Package** is still visible. Leave it open for the next task.




## Task C.6 How Do I Log Reviewed Submittal Package Information?

The architect, Valley Architects, reviewed and returned the submittal information to you. They only approved two of the three items – the samples and product data. The ceramic tile shop drawings need to be revised and resubmitted. In this task, you will modify the entries in the **Items from Submittal Register** grid to reflect these actions.

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. In the <b>Submittal Packages</b> record <b>001-09310</b> , click the <b>Package Items</b> tab.	
2. Under <b>Items from Submittal Register</b> , in the <b>Action</b> column for both <b>Ceramic Tile Samples</b> and <b>Product Data</b> select <b>Approved As Noted</b> .	
3. Under <b>Items from Submittal Register</b> , in the <b>Action</b> column for <b>Ceramic Tile Shop Drawings</b> select <b>Revise and Resubmit</b>	The shop drawings were not approved by the architect and need to be revised and resubmitted.
4. In the <b>Ret Date</b> column for all three rows, press <b>CTRL + D</b>	Today's date appears in the <b>Ret Date</b> (Returned Date or the date the submittal item was returned from the reviewer) column.
5. Select the check box in the <b>Returned</b> column for all three rows.	This indicates samples were returned by the architect.
6. Select the check box in the <b>Closed</b> column for the first TWO line items.	The first two items were approved, and therefore will be closed. The third item needs to be revised, and will not be closed at this time.
7. Click <b>Save</b>	

## Task C.7 How Do I Create a Submittal Package Revision

Two of three submittal items were approved by the architect, which you logged in the previous task. You can now create a new submittal package for the outstanding Ceramic Tile Shop Drawing item.

<u>What do I do?</u>	<u>What happens?/Comments</u>
1. In <b>Submittal Packages</b> record <b>Number 001-09310</b> click the <b>Package Items</b> tab.	
2. Under <b>Items from Submittal Register</b> , click <b>Create Package Rev.</b>	

### 3. Click Yes

A new Submittal Package record appears:

The record number for the submittal package remains the same, but the number in the **Rev** field is now **1**. Only the **Ceramic Tile Shop Drawings** submittal item is displayed in the **Items from Submittal Register** grid. The item displays the record because you did not mark it as closed.

- When you create a revision of a submittal package, you create a new record. Consequently, you must save the new record.

## D. Creating Drawing or Specification Logs

You can use the *Drawings and Specifications* form to create records for drawings and specifications, which provide information for requirements on a project. Each record you create in the *Drawings and Specifications* form can track the history of one drawing or specification.

### Task D. 1 Entering Drawings and Specifications


Using the *Drawings and Specifications* form, you can create drawing or specification records, which you can later compile into a drawing package. When you create a drawing or specification record, you need to enter a name and discipline for the record. You can also enter specific information about the size and scale of the drawing, and any related notes.

For this task, you've just received the first set of mechanical drawings for your project. You need to enter the information for these records, including specific titles for each, as well as who designed the drawings.

#### What do I do?

1. On the Switchboard, click the **Doc Control** button, and click **Drawings and Specifications**.

#### What happens?/Comments

 Prolog Manager opens the *Drawings and Specifications* form.



2. In the **Number** field, type: **M1.01**
3. In the **Title** field, type: **Mechanical Title Sheet**
4. On the General tab, in the **Discipline** list, select **Mechanical**.
5. In the **Design Company** field use the lookup button and select: **Valley Architects**

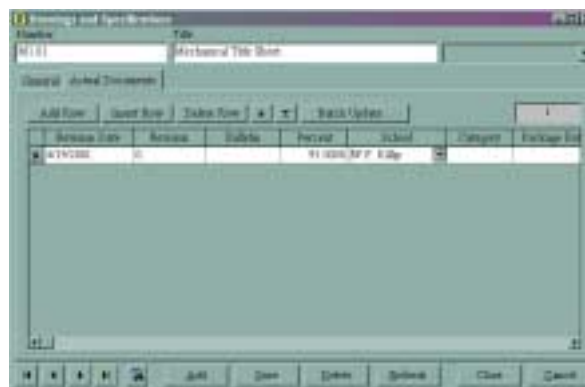
Note that the default contact automatically fills in. Another contact can be picked if required.



## What do I do?

## What happens?/Comments

6. Click the **Actual Documents** tab. This tab tracks revisions to the drawing or specification record.



7. Click **Add Row**.



Prolog Manager adds a row to the Actual Documents grid.

8. In the **Revision Date** column, CTRL+D inserts today's date.  
press **CTRL+D**.
9. In the **Revision Number** column, Revision 0 indicates this is the original issue of a  
type: **0** drawing.
10. In the **Percent Complete** field The drawing is 95% complete  
type **95**
11. Click **Save**.

## Task D.2 Creating New Drawing or Specification Records from Existing Records

Because most drawings in a drawing package have similar record information, you can save time when entering several drawings by creating a new record from an existing record. You will use data entered in the previous task to create a new drawing record numbered M1.02.

## What do I do?

1. Open Drawings and Specifications record **M1.01**.

### What happens?/Comments

- In the Number field, change **M1.01** to **M1.02**.
- Press the **TAB** key.

Prolog Manager displays a message prompting you to select whether you want to create a new record using the current data.

- Click **Yes**.
- Make any revisions to the info for this new sheet. For this exercise, change the **Title** field from Mechanical Title Sheet to **Mechanical Equipment Schedule**.
- Click **Save**.
- Close** the form.

Prolog Manager creates a new Drawing and Specification record numbered M1.02 with the data from record M1.01. Prolog Manager does not overwrite the M1.01 record.

## E. Creating Drawing Packages

You can link several drawings to a drawing package using the *Drawing Packages* form. The *Drawing Packages* form helps you organize and record information about a set of drawings that you send to or receive from another company.

Drawing Packages also allow users to link multiple drawings to another Prolog record faster. For example, rather than linking a contract to individual drawings that make up the bid set, a user can simply create a package from the bid set and by linking the package to the contract, links to the drawings within the package are automatically created.

## Task F.1 Linking Drawings and Specifications to a Drawing Package

In this task, you will create a drawing package for the drawing records you just created, and then compile the drawing records into a construction drawing package.

## What do I do?

1. On the Switchboard, click the **Doc Control** button, and click **Drawing Packages**.

### What happens?/Comments



Prolog Manager opens the *Drawing Packages* form.

- In the **Number** field, the next available number, **001**, will appear.
- In the **Description** field, type: **Mech-A**.
- Click the **Drawings and Specs** tab.

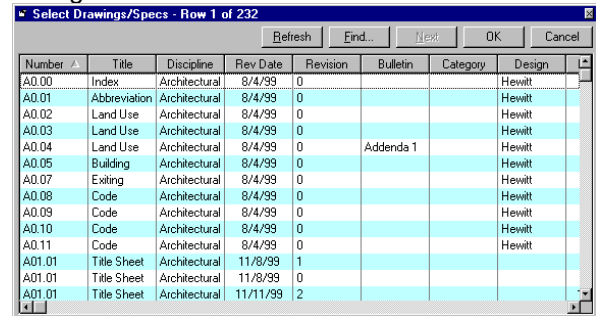
### What do I do?

5. Click **Add Link**.

### What happens?/Comments

Add Link...

Prolog Manager opens the Select Drawings/Specs dialog box.



6. In the Select Drawings/Specs dialog box, select drawings **M1.01** and **M1.02**

Click on M101, hold the control key down and click on M102. This will select both records.

7. Click **OK**.

Prolog Manager closes the Select Drawings/Specs dialog box and displays each drawing as a row in the Drawings and Specs grid.

8. Click **Save**.

## F. Updating Multiple Drawings and Specifications

The **Drawing Batch Update Wizard** enables you to make updates simultaneously to several individual drawing or specification records or drawings in a drawing package. In addition, the wizard does not require that you make the same changes to all records, so you only need to update the drawing records affected.

### Task F.1 How Do I Use the Drawing Batch Update Wizard?

After creating the construction drawing records and compiling the records into a drawing package, you receive a bulletin that contains revision information for the drawing package from the architect, Valley Architects. You now need to log this new information. To save time, you can use the **Drawing Batch Update Wizard** to update all of the drawings in the package at once.

#### What do I do?

1. On the **Tools** menu, point to **Wizards**, and click **Drawing Batch Update Wizard**.

#### What happens?/Comments

The Drawing Batch Update Wizard appears:



2. Click **Create Drawing Revisions**
3. Click **Next**
4. In **Step 2** of the wizard, click on the **Drawing Package List** tab

Step 2 of the wizard appears



5. Select **Mech-A**, the drawing package you created in the previous Chapter.
6. Click **Next**

Step 3 appears

### What do I do?

7. In **Step 3**, confirm that both drawings are selected and click **Next**.
8. In the **Percent** column for drawing **M1.01**, enter **100**

### What happens?/Comments

Step 4 appears



9. In the **Percent** column of the first row, highlight **100** and press **CTRL + C** (Copy).

Highlight the entire **Percent** column by clicking on the column header and press **CTRL + V** (Paste).

If you had several more rows in which to enter **100**, copying and pasting saves a lot of time.

10. Click **Next**

Step 6 appears. If you had selected to send transmittals in Step 1, then step 5 would appear.

11. Click **Finish**

The **Drawing Batch Update Wizard** closes and your drawings have been updated..

---

**Note:** You can also access the **Drawing Batch Update Wizard** through the **Drawings and Specifications** form by clicking **Batch Update** on the **Actual Documents** tab.

---

---

**A Cool Tool:** Remember that in the **Drawing Package** form, you can link each drawing package to a distribution list (via the **Default Distribution List** located within the form). Under **Transmittal Queue Options/Process /Transmittals**, the **Find contents based on transmittals previously sent etc.** indicates you want the same drawings you sent last time to be the default selections when you open the pick list. This setting is particularly useful when you want the same drawings you sent last time to be the default selections when you open the pick list. This setting is particularly useful when you want to do an update of the same drawings over and over again or when all revisions under the same drawing header (for example, **A1**) share the same set of contracts. If you change this setting to **Find contents based on distribution lists, etc.** then the default selection will be all the contacts for a distribution list linked to this drawing program. Since this is your first drawing update, this setting does not matter this time. You can always change these defaults to alternate selections.

---

## G. Creating Issues

An issue is any topic that has an impact on your project. RFI's, meeting minute items, conversations, and so on, are all potentially issues. You can link records as you create them, using the **Link Issues** button on the toolbar or you can link many at once, using the Search capabilities of the **Build Issues Wizard**.

In this set of tasks, you will create an issue based on a request for information that created additional costs. You will also build an issue by searching the database for specific information on rain days.

### Task G.1 How Do I Link Issues to Prolog Manager Records?

The request for information you entered in Tasks D.1-D.7 created additional costs, and now Four Star Contracting, the contractor, needs to be paid for additional welding performed. In this task, you will create an issue for the additional costs and link the issue to the **Request for Information** record.

#### What do I do?

1. Open **Request for Information** record **001-Moment Frame connection**

#### What happens?/Comments



2. On the toolbar, click **Link to Issues**.



The **Link to Issues** dialog appears:



### What do I do?

### What happens?/Comments

3. Click **Add New**

The **Issues** form appears:

4. In the **Name** field, type: **Additional Welding Cost**

5. On the **General** tab, in the **Date** field, press **CTRL + D**

Today's date appears in the **Date** field

6. In the **Description** field, type: **RFI 001 created additional welding costs.**

7. In the **Responsible Company** field, type: **CANENG**

**CANENG** is the company code for **Canyon Engineering**, the engineering firm responsible for approving the payment to Four State Contracting

8. In the **General Notes** field, type: **Four State Contracting needs to be paid for extra welding performed per RFI 001.**

9. Under **Cost Impact**, select **Yes**

Although the RFI has an impact, selecting Yes does not affect the budget in any way.

10. In the **Comments** field, type: **Amount TBD**

11. Click **Save**

12. Click the **minimize** button in the upper right corner of the window to minimize the **Issues** form



13. In the **Link Issues** dialog, click **Refresh**

The **Additional Welding** issue appears as a row in the **Select Issues** grid.

14. Click **Ok**



<u>What do I do?</u>	<u>What happens?/Comments</u>
15. Select <b>Additional Welding Cost</b> .	To select an issue from the list, double-click the button next to its name on the extreme left. The name of the selected issue appears in the bottom grid.
16. Click OK	The <b>Link Issues</b> dialog closes and the <b>Request For Information</b> form is active.
17. Close the <b>Request For Information</b> form.	
18. Restore the <b>Issues</b> form	
19. Click <b>Refresh</b>	
20. Click the <b>Items</b> tab	A row has been added to the Items grid, representing the link to the RFI.
21. Click <b>Save</b>	
22. Close the <b>Issues</b> form.	

## Task G.2 How Do I Build an Issue from Existing Information?

With the **Build Issue Wizard**, you can either build a new issue using existing data or create an issue with all new information. In this task, you'll create an issue by searching the database for all occurrences of rain documented in the Daily Details form.

### What do I do?

- 1 On the **Switchboard**, click **Doc Control** and on the menu, click **Issues**.

### What happens?/Comments



The Issues form appears:

A screenshot of the "Issues" form. It has tabs for "General" and "Items". The "General" tab is active, showing fields for "Name", "Date", "Description", "Responsible Designer", "Responsible Contact", "General Notes", "Cost Report", "Task Item Number", and "Comments". The "Date" field contains today's date. The "Name" field is empty. The "Description" field is empty. The "General Notes" field is empty. The "Cost Report" field is empty. The "Task Item Number" field is empty. The "Comments" field is empty. The "Items" tab is visible but not active.

2. In the **Name** field, type: **Rain Days**
3. On the **General** tab, in the **Date** field, press **CTRL+D**. Today's date appears in the Date field
4. In the **Description** field, type: **Rain days that have affected current schedule**
5. Click the **Items** tab

A screenshot of the "Issues" form with the "Items" tab active. The "Name" field contains "Rain Days". The "Date" field contains today's date. The "Description" field contains "Rain days that have affected current schedule". The "Items" tab is active, showing a table with columns: "Item", "Reference", "Item", "Cost Report", and "Item". The table is empty. The "General" tab is visible but not active.

### What do I do?

6. Click **Build Issue**

### What happens?/Comments

Build Issue...

The Build Issue Wizard begins. In Step 1 the information you entered in the Issues form has been copied into the fields in the wizard.



In this task, you are appending the issue we just created, but you can also use the **Build Issue Wizard** to create a brand new issue by selecting **Wizards** from the **Tools** menu, then selecting the **Build Issue Wizard** and clicking the **Create New Issue** tab.

7. Click **Next**
8. In **Step 2**, in the **Include** column, check the **Daily Details** group name.

**Step 2** appears:



9. Under **Search Criteria**, in the first row of the first column, type: **rain**

**Rain** appears as a search criterion in the field under the **Search Criteria** grid.

### What do I do?

10. In the first column of the second row, type: **delay**

### What happens?/Comments

**Delay** appears as a search criterion in the field under the **Search Criteria** grid.

Under **Search Criteria** you can also conduct searches using the AND operator. If you had entered “delay” in the second column of the first row, then you would have used the AND operator. Records that contain both the words “rain” and “**delay**” would be selected.

11. Click **Next**.

In Step 3, the wizard displays a list of all **Daily Details** records which contain the words “rain” or “**delay**”



12. Click **Next**.

The final page of the wizard appears:

13. In the **Specifications** field, type: **rain delay search**.



14. Click **Save**.

This saves the specifications of this search for future re-use.

15 Click **Finish**

15 Click **Finish**

The **Build Issue Wizard** closes and the **Issues** form becomes active:



Each record listed in the wizard appears as a row in the **Items** grid. You can select a row and click **Show reference** to open that row.

16. Click **Save**

## H. Conversation Log

The **Conversation Log** form creates records of project-related communication. In this task, you will track a conversation you had with a contractor about jobsite equipment.

### Task H.1 How Do I Enter Conversation Information?

You have just had a conversation with Malcolm Jakes of Tempe Builders. He reminded you that the on-site roofing equipment needs to be locked down overnight. To create a record in the **Conversation Log** form for this conversation, you need to enter the time, date, and subject of the conversation.

#### What do I do?

1. On the Switchboard, click the **Doc Control**, on the menu click **Conversation Log**.

#### What Happens?/Comments



The **Conversation Log** form appears with the next available record number entered in the **Number** field and your user name entered in the **Logged By** field:

A screenshot of a software window titled "Conversation Log". The window has a standard Windows-style title bar with "min", "max", and "close" buttons. Below the title bar is a menu bar with "File", "Edit", "Format", and "Help". The main area of the form is divided into several sections. At the top, there are fields for "Number", "Date", "Time", and "Subject". Below these are fields for "Logged By" (containing "Malcolm Jakes"), "Project" (containing "Maverick Construction, Malibu"), and "Type" (containing "Phone"). There are also fields for "Other Party" and "Company". A large text area for "Comments" is at the bottom. The form has a light blue background and various input fields and buttons.

2. In the **Date** field, press **CTRL + D** Today's date appears
3. In the **Time** field, type: **7:15** The entry appears as 07:15AM
4. In the **Subject** field, select:  
**On-Site Roofing Equipment Issue.**
5. On the General tab, in the **Other Party** field, type: **MALJAK** **MALJAK** is the ID for **Malcolm Jakes**, whose name now appears in the **Other Party** field, and **Tempe Builders**. Malcolm's company, appears in the **Company** field.
6. In the **Type** list, type: **Phone** **"Phone Conversation"** is filled in. This indicates that the conversation was via telephone. You could have also typed **InPer** to indicate a conversation that took place in person.

### What do I do?

7. Under Conversation Details, in the **Summary of Conversation** field, type: **Malcolm says the equipment must be properly stored and locked down overnight. We decided to assign the responsibility to Fred Jameson, the project superintendent.**

8. Click **Save**

### What Happens?/Comments

The screenshot shows a 'Conversations Log' window with a 'Details' tab selected. The window contains the following fields and data:

- Number:** 4204580
- Date:** 4/24/2001
- Time:** 8:19 A.M.
- Subject:** (empty)
- Logged By:** (empty)
- Telephone:** 420 976 7500
- Type:** Other Conversation
- Other Party:** (empty)
- Telephone:** 420 947-4321
- Conversation Details:**
  - Summary of Conversation:** Malcolm says the equipment must be properly stored and locked down overnight. We decided to assign the responsibility to Fred Jameson, the project superintendent.
  - Follow Up:** (empty)
  - Follow Up From:** (empty)
  - Follow Up To:** (empty)
  - Follow Up Date:** (empty)

At the bottom of the window are buttons for 'OK', 'Cancel', 'Print', 'Delete', 'Refresh', 'Close', and 'Cancel'.

# ***Reports***

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# ***Chapter 10***

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## **ARIZONA SCHOOL FACILITIES BOARD**

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### **Students FIRST Program**

# **SUBSTANTIAL COMPLETION**

## **Chapter Description**

### **A. Punch Lists**



## A. Using Punch Lists

You can use the Punch List form to create a list of items which need to be completed, fixed, or redone before the Certificate of Final Completion can be issued.

### Task A.1 How Do I Create a Punch List Record?

You can use the Punch List form to track a description of each item, where it's located and all the dates associated with it..

#### What do I do?

1. On the **Switchboard**, click **Field Admin** and on the menu click **Punch List**

#### What Happens?/Comments



The Punch List form appears with the next available record number displayed in the Number field.

A screenshot of the "Punch List" form. The form has a title bar "Punch List" and a menu bar with "File", "Edit", "View", "Tools", "Help". Below the menu bar are several input fields: "Number", "Room", "Interior/Exterior", "Building", "Location/Floor", "Room No". The main body of the form contains several sections: "Responsible Company", "Contract", "Supplier", "Status" (with a dropdown menu); "Actual Company", "Assigned By", "Assigned By", "New Value"; "Description" (a large text area); and "General Notes" (a smaller text area). At the bottom, there are checkboxes for "Cost Tracking", "Approved", "Noted On", "Inspected On", "Completed", "PM Signed", "J.E. Signed", "J.E. Signed", and a "Save" button. The bottom of the form has a navigation bar with buttons for "Back", "Forward", "Print", "New", "Delete", "Refresh", "Close", and "Cancel".

2. In the **Interior/Exterior** list, select **Interior**
3. In the **Building** list, select **A**
4. In the **Location/Floor** list, select **1<sup>st</sup> Floor**
5. In the **Room No** list, select **125**
6. Click **Save**

## Task A.2 How Do I Enter Information on the Punch List?

Once you create the punch list record, you can enter additional information about who completed the inspection, who is responsible for making corrections, and a description of the items to be completed.

### What do I do?

1. On the **Punchlist** form, click the Lookup button next to the **Contact** field

### What Happens?/Comments



The Contact Pick list appears:

Display Name	Title	Company ID	Company Name	Location	Phone No.
Doug Douglas	Assistant	0750778	CV Subcontractors	Glendale	626-411-1111
Douglas Douglas	Assistant	VALLACR	Valley Architects	Man	626-411-1111
Douglas Douglas	Project	ACC	Acme Construction	Man	626-411-1111
Douglas Douglas	Project	ASAPRO	ASAPRO Project	Man	626-411-1111
Douglas Douglas	Project	CM/PM	CM/PM Project	Man	626-411-1111
Douglas Douglas	Project	HEGIST	Heavy Industries, Inc.	Man	626-411-1111
Douglas Douglas	Project	PCURST	Four State Contracting	Man	626-411-1111

2. In the **Contact pick List**, select **Doug Douglas**

3. Click **OK**

The **Contact Pick List** closes and **Doug Douglas** appears in the **Contact** field and **Four State Contracting** appear in the **Responsible Company** field.

4. In the **Author Company** field, type **ACC**

**Acme Construction** is reporting the missing door.

5. Press TAB

Your name populates the **Authored by** field.

6. In the **Description** field, type: **Door is missing**

7. Under **Date Tracking** in the **Inspected** field, press **CTRL + D**

Today's date appears.

8. In the **Rec'd On** field, press **CTRL + D**

This is the date Doug Douglas received the punch list item.

9. In the **Issued On** field, press **CTRL + D**

The Issued on date indicates the day the item was given to the contractor.

10. Click **Save**

### **Task A.3      How Do I Create a Punch List Item by Copying?**

If you want to create multiple punch list items with most of the same information, you can copy one punch list item to another.

<b><u>What do I do?</u></b>	<b><u>What Happens?/Comments</u></b>
1. With the Punch List form from the previous example still open, click Add	The Punch List form Number is incremented by 1. If your previous record is number 001, this one becomes 002. The Description field is cleared. All other information is unchanged.
2. In the Description field, type: Window is still unpainted	
3. Click Save	The new Punch list item is added to your database. Keep this record open for the next task.



# ***Reports***

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# ***Chapter 11***

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## **ARIZONA SCHOOL FACILITIES BOARD**

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### **Students FIRST Program**

# **CLOSEOUT**

## **Chapter Description**

### **A. Using the Closeout Log**



## A Closeout Log

The Closeout Log form creates and maintains records of closeout items that need to be returned at the end of a project. In these tasks, you will create a closeout item record for as-built drawings.

### Task A.1 How Do I Create Closeout Item Records?

In this task, the GC's are responsible for turning in records of as-built drawings to the ASFB when the project is complete. You need to have Malcolm Jakes from Tempe Builders deliver the completed drawings to you, so you can deliver them to the ASFB. To create a closeout item in the **Closeout Log** form, you need to assign a responsible party, identify the closeout item, and indicate when the item is due.

#### What do I do?

1. On the Switchboard, click **Doc Control** button, and on the menu, click **Closeout Log**.

#### What Happens?/Comments



The **Closeout Log** form appears:

A screenshot of the "Closeout Log" form. The form has a title bar at the top with "Closeout Log" and a "Close" button. Below the title bar is a "Number" field. Underneath is a "Description" field. Below that is a "General" tab. The "General" tab contains several fields: "To Company", "From Company", "To", "From", "To Date", "Due Date", "Received Date", "Assigned Date", and "Status". Below these fields is a large text area for "Notes". At the bottom of the form is a toolbar with buttons for "Add", "Edit", "Delete", "Refresh", "Print", and "Cancel".

2. In the **Number** field, type: **AB-10**
3. In the **Description** field, type: **As-Built Drawings for West Wing.**
4. On the **General** tab, in the **To Company** field, type: **ASFB**

### What do I do?

- Click the Lookup button next to the **From Company** field.

### What Happens?/Comments



The **Select Company Dialog** appears:



Company ID	Company Name	Type Of Company	Issued	Trade
ALAPRO	ALAPRO Project	Project Manager		
ALCC	ALCC Contracting	Project Manager		
ALCAG	ALCAG Architect	Architect		
ALCOC	ALCOC General	General Contractor		
ALCPM	ALCOC Project	Project Manager		
ALCPH	ALCOC School	Project Manager		
ALCOTM	ALCOC Contracting	Project Manager		
ALCOWD	ALCOWD Engineering	Consultant		
ALCOWD	ALCOWD Florida	Project Manager		
ALCOWD	ALCOWD FL	Project Manager		
ALCOWD	ALCOWD	General Contractor		
ALCOWD	ALCOWD	Project Manager		
ALCOWD	ALCOWD	Project Manager		
ALCOWD	ALCOWD	Project Manager		
ALCOWD	ALCOWD	Project Manager		

- In the Select Company list, select **Tempe Builders**, and click **OK**
- In the Issued Date field, Today's date appears. press CTRL + D
- In the Due Date field, enter the date 10 days from today.
- In the **Notes** field, type: **3 copies of drawings need to be turned in.**
- Click **Save**.

# ***Reports***

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# Chapter 12

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## ARIZONA SCHOOL FACILITIES BOARD Students FIRST Program

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### QUERY MANAGER

#### Chapter Description

The Query Manager feature in Prolog Manager is one of the most powerful features the software has to offer. Each construction project is unique, as is each user of the database. Different staff members have different pieces of information that they are responsible for managing. Query Manager provides a tool by which each project team member can review and report on data that is specific to their needs. This section covers the following topics:

- A. An overview of query Manager
- B. How to run an existing query
- C. How to add new queries





## A. An Overview of Query Manager

Before we begin it is important to define what a query does. In simple terms, a query is just a question submitted to the database by a user, asking for information meeting specific criteria. Once the query is executed, it searches all the specified records and if records are found that match the specific criteria, the results are displayed to the user.

For example, the project engineer can design a query that looks for overdue RFI's. The specific criteria for this query would be based on two main factors: (1) that the RFI has a due date that has passed, and (2) the RFI has not yet been answered. When the query is run, it searches all records contained in the RFI table, and any RFI matching these two criteria will show up as a record in the query results window.

Prolog Manager provides additional flexibility in that the user can designate as many key specific criteria as they wish. In addition, the user can specify which fields of the resulting records are displayed and in which sequence the fields are ordered in the query results table. To continue with the previous example, a user may only be interested in the overdue RFI's related to mechanical issues. Adding to the previous query, the user adds an additional key criteria stating that the records must contain the discipline field value "Mechanical". The user can then further state as part of the query design that the query results window should only display the fields associated with RFI No., RFI Description, Date Submitted, Due Date, and Originating Company Name. Once this query is run, any records that meet the key criteria would be displayed according to this field layout.

Once created, queries can be saved and run at any time. An additional feature in Prolog Manager is that once the query results are displayed the user can jump directly to any individual record in the query results, simply by clicking on the record number in the query results window.

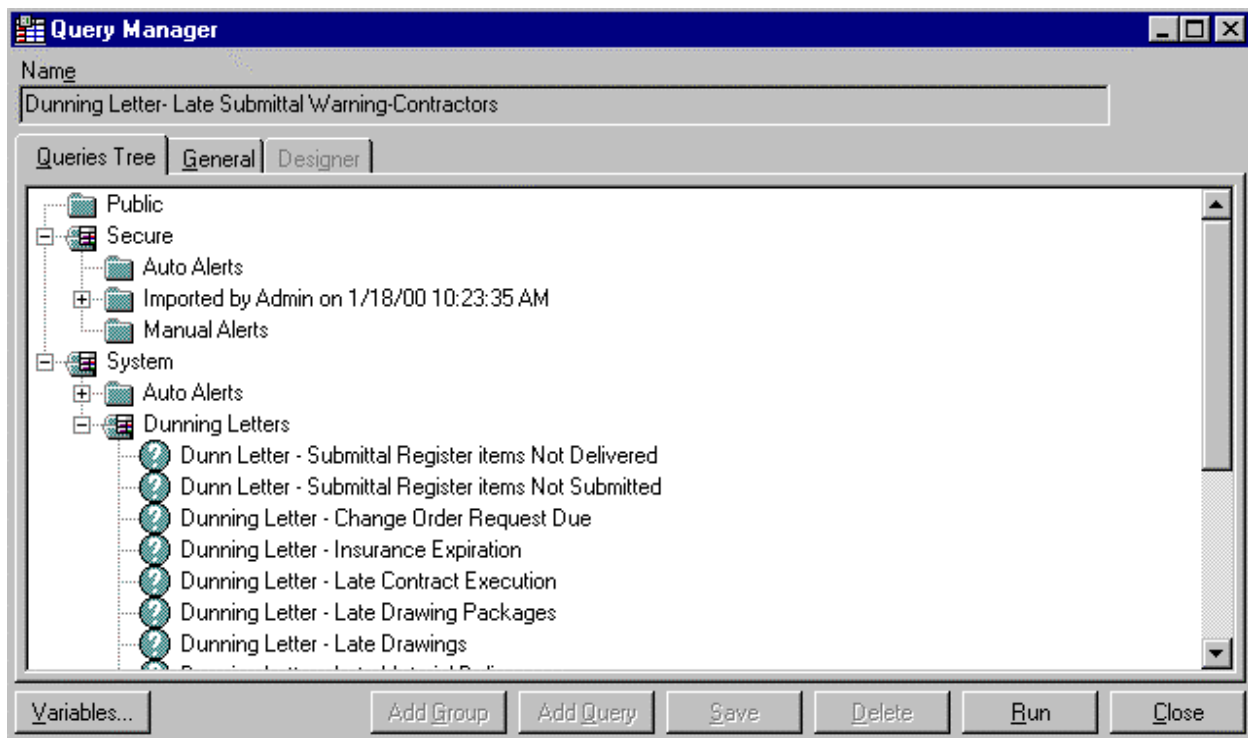
The only significant limitation with respect to Query Manager that should be considered is that each query is limited to a single data group. As an example, a user would not be able to design a query that searches for data in both RFI's and Submittals.

Query results can be quickly printed or exported to Microsoft Excel as needed. Without question, the query Manager feature in Prolog Manager is the most powerful feature the software has to offer.

When you open Query Manager, you see the Queries tree displayed on the Queries Tree tab. The Query tree looks and works like Windows Explorer. You can click the plus sign next to a folder to expand that part of the tree and see all the folders or queries in that branch of the tree. Click the minus sign to collapse the branch and hide the folders or queries.

The Query Tree always displays the Public, Secure, and System folders. These folders are root folders. Root folders cannot be renamed, moved, or deleted. Root folders are used to organize predefined and custom queries. Queries in the Public folder are available to all users. Queries in the Secure folder are available only to the person who created the query. Queries in the System folder are the default queries used for auto alerts and dunning letters and are included in the software. When a user runs a query in the Secure folder or the System folder, Security Manager checks the access rights of the user and only displays information the user has been given access to see.

The following illustration identifies the main part of the Queries tree.



## B. Running a Query

When you run a query, Prolog Manager searches the project database for records that match the criteria specified in the query. Prolog Manager displays all the records that match the criteria in a query results table.

### Task B.1 Running a Query

For this task, you want you a list of all the Requests for Information that have not been answered. You will run the Request for Information Not Answered auto alerts query.

#### What do I do?

1. Click the Query Manager button on the toolbar.
2. Click the plus sign next to the System folder.
3. Click the plus sign next to the Auto Alerts folder.
4. Scroll down and select the Request for Information Not Answered query.

#### What Happens?/Comments



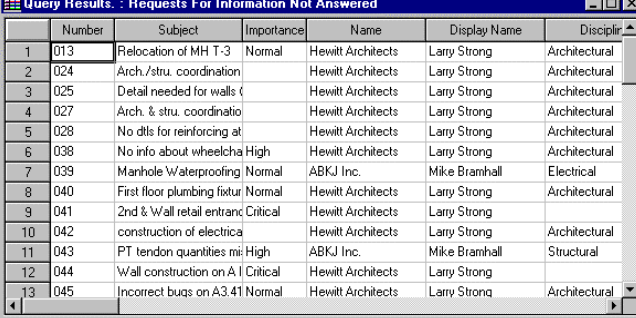
Prolog Manager opens the Query Manager.  
Prolog Manager opens the System folder.



Prolog Manager opens the Auto Alert folder.

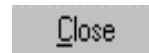
5. Click Run.

Prolog Manager runs the query and displays the results in the Query Results window.



	Number	Subject	Importance	Name	Display Name	Discipline
1	013	Relocation of MH T-3	Normal	Hewitt Architects	Larry Strong	Architectural
2	024	Arch./stru. coordination		Hewitt Architects	Larry Strong	Architectural
3	025	Detail needed for walls		Hewitt Architects	Larry Strong	Architectural
4	027	Arch. & stru. coordination		Hewitt Architects	Larry Strong	Architectural
5	028	No dets for reinforcing at		Hewitt Architects	Larry Strong	Architectural
6	038	No info about wheelchair	High	Hewitt Architects	Larry Strong	Architectural
7	039	Manhole Waterproofing	Normal	ABKJ Inc.	Mike Bramhall	Electrical
8	040	First floor plumbing fixture	Normal	Hewitt Architects	Larry Strong	Architectural
9	041	2nd & Wall retail entrance	Critical	Hewitt Architects	Larry Strong	
10	042	construction of electrical		Hewitt Architects	Larry Strong	Architectural
11	043	PT tendon quantities missing	High	ABKJ Inc.	Mike Bramhall	Structural
12	044	Wall construction on A.I.	Critical	Hewitt Architects	Larry Strong	
13	045	Incorrect bugs on A3.41	Normal	Hewitt Architects	Larry Strong	Architectural

6. Click the Close button on the Query Results window.



## C. Creating a Query

You can use Query Manager to create a new query specific to your project needs. When you create a query, you can determine how you view and locate information stored in Prolog Manager. By taking the time to create custom queries, you can later save time finding and organizing information.

In this set of tasks, you will use Query Manager to organize the Company Setup pick list. When you click the Lookup button on the Company Setup form, Prolog Manager displays the Company Setup pick list.

Prolog Manager automatically uses the <Default> query to sort the records in the Company Setup pick list. The <Default> query sorts Company records by Company ID. You are going to create a query which sorts the Company records by Type of Company. You also want to use fewer columns in the new query.

Note: The following concepts apply to any data group within Prolog Manager.

### Task C.1 Adding a Folder

Before you create a query, you create a folder in which to place the new query.

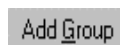
#### What do I do?

1. Click the **Query Manager** button on the toolbar.
2. On the **Queries Tree** tab, click the **Public** folder.
3. Click the **Add Group** button on the bottom of the Query Manager window.
4. In the **Name** field on the top of the Query Manager window, type: **My Custom Pick Lists**.
5. Click the **General** tab.

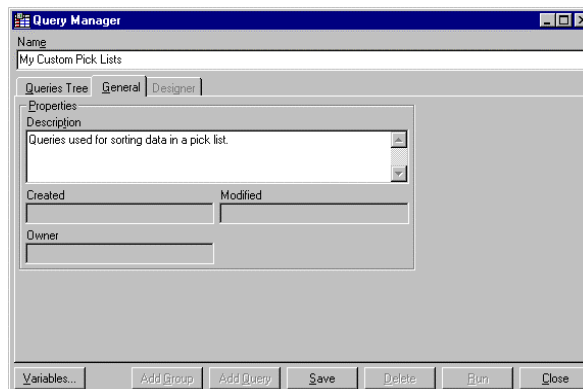
#### What Happens?/Comments



Prolog Manager opens the Query Manager.



Prolog Manager creates the New Group folder on the Public folder.



### What do I do?

- Under **Properties**, in the **Description** field, type: **Queries used for sorting records in a pick list**.
- Click **Save**.

### What Happens?/Comments

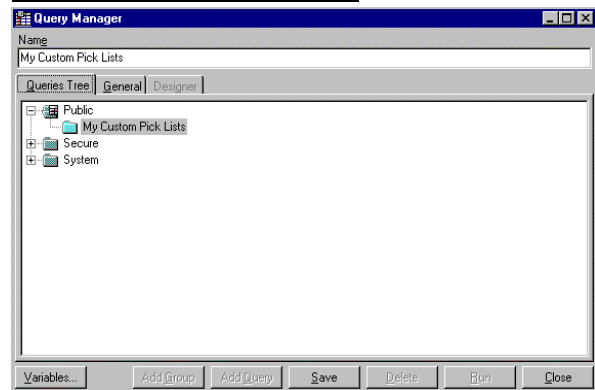
## Task C.2 Creating a Query

When you create query, you need to decide in which folder you want to place the new query. You can also enter a title and description for the query .

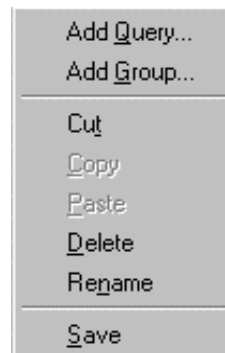
### What do I do?

- Click the **Queries Tree** tab.

### What Happens?/Comments



- Right click the **My Custom Pick Lists** folder, and select **Add Query** on the shortcut menu.



Prolog Manager adds a new query to the My Custom Pick Lists folder.



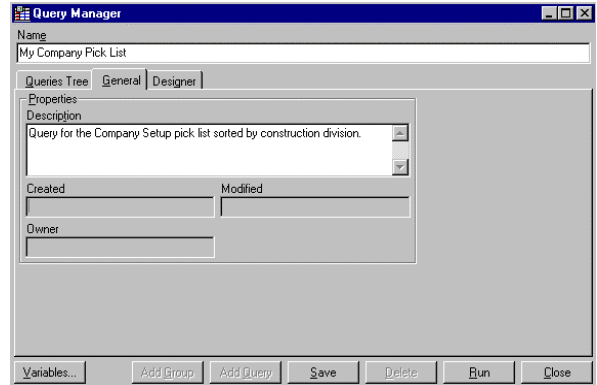
- In the **Name** field at the top of the Query Manager window, type: **My Company Pick List**.



### What do I do?

4. Click the **General** tab.

### What Happens?/Comments



5. In the **Description** field, type:  
**Query for the Company Setup  
pick list sorted by type of  
company.**

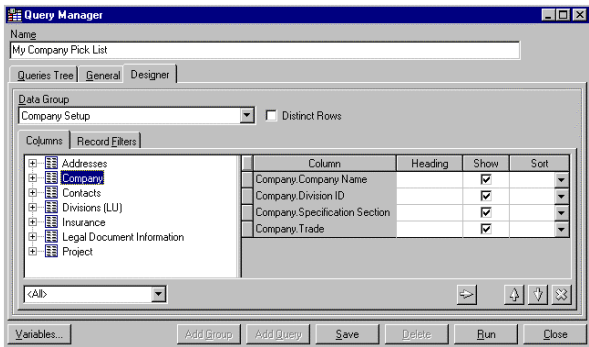
### Task C.3     Selecting Columns for a Query

You want your query results to display the Company ID, Company Name and Type of Company for each company in the project database.

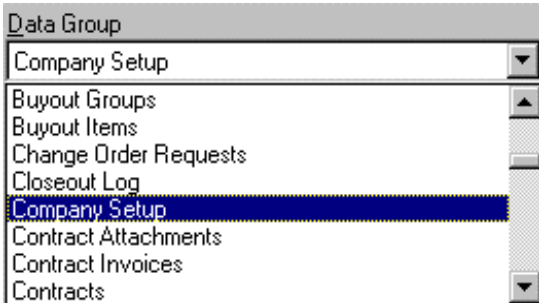
#### What do I do?

1. Click the **Designer** tab.

#### What Happens?/Comments

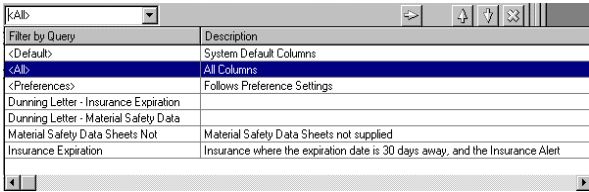


2. In the **Data Group** list, select **Company Setup**.



The Columns tab under the Data Group list displays all of the tables in the Company Setup data group.

3. Make sure **<All>** is selected in the query selection box in the lower left corner of the screen.



Prolog automatically uses the <Default> query when Query Manager is run. The <Default> query does not list all the tables and columns necessary to build some queries.



### What do I do?

- On the **columns tree**, click the + next to the **Company** table.

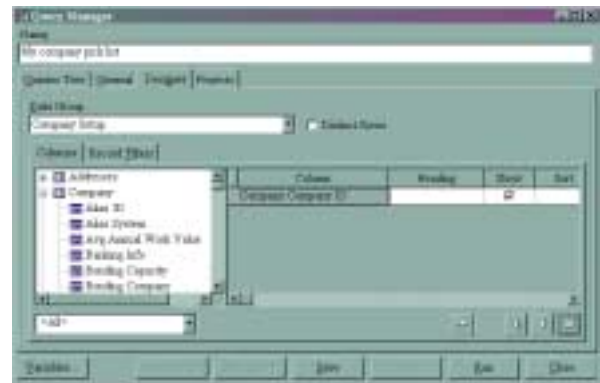
### What Happens?/Comments



Prolog Manager displays all of the columns in the Company table.

- Double-click the **Company ID** cell

Prolog Manager Inserts the Company.Company ID column in the Column grid on the right.



- Repeat step 5 for the following columns in the Company table:

**Company Name**  
**Type of Company**



If you accidentally add a column you do not need into the Columns grid, right click a column in the grid, and click Delete on the shortcut menu

- Click **Save**.

## Task C.4 Determining Heading Names for Query Results

You can specify the headings you want to use for each column in the query results table. By default, Prolog Manager uses the column names as the heading names. In this task, you will specify headings for the three columns.

### What do I do?

1. In the **Heading** column for the **Company.Company ID** row, type: **ID**
2. In the **Heading** column for the **Company.Company Name** row, type: **Name**.
3. In the **Heading** column for the **Company.Type of Company** row, type: **Company Type**.

### What Happens?/Comments

Column	Heading	Show	Sort
Company.Company ID	ID	<input checked="" type="checkbox"/>	
Company.Company Name		<input checked="" type="checkbox"/>	
Company.Type Of Company		<input checked="" type="checkbox"/>	

Column	Heading	Show	Sort
Company.Company ID	ID	<input checked="" type="checkbox"/>	
Company.Company Name	Name	<input checked="" type="checkbox"/>	
Company.Type Of Company		<input checked="" type="checkbox"/>	

Column	Heading	Show	Sort
Company.Company ID	ID	<input checked="" type="checkbox"/>	
Company.Company Name	Name	<input checked="" type="checkbox"/>	
Company.Type Of Company	Company Type	<input checked="" type="checkbox"/>	

## Task C.5 Determining the Order Columns Appear in the Query

The order in which the columns are listed in the columns grid determines how the columns appear in the query results. The column in the first row of the grid appears as the left-most column in the query results. In this task, you will change the order the columns will appear in the query results.

### What do I do?

1. In the **Columns** grid, select the **Companies.Type of Company** field.

2. Click the **Move Up** button in the lower right corner of the Columns tab to move **Companies.Type of Company** column to the top of the grid.

### What Happens?/Comments



Column	Heading	Show	Sort
Company Type Of Company	Company Type	<input checked="" type="checkbox"/>	
Company Company ID	ID	<input checked="" type="checkbox"/>	
Company Company Name	Name	<input checked="" type="checkbox"/>	

3. In the **Columns** grid, select the **Companies.Company Name** field.

4. Click the **Move Up** button in the lower right corner of the Columns tab to move **Companies.Company Name** to the second position.



Column	Heading	Show	Sort
Company Type Of Company	Company Type	<input checked="" type="checkbox"/>	
Company Company Name	Name	<input checked="" type="checkbox"/>	
Company Company ID	ID	<input checked="" type="checkbox"/>	

5. Click **Save**

## Task C.6 Sorting Query Results

You want Prolog Manager to sort the results of the query first by Type of Company, and then by Company Name.

### What do I do?

1. In the **Companies.Type of Company** row, in the **Sort** column, select **Ascending**.

### What Happens?/Comments

Sort
Ascending ▼
None
Ascending
Descending

Ascending order sorts records from 0-9 and A-Z.

2. In the **Companies.Company Name** row, select **Ascending** in the **Sort** column.

The query will sort first by Type of Company, then by Company Name within each Company Type..

3. Click **Save**.

Prolog Manager saves the query.

### What do I do?

4. Click **Run**.

### What Happens?/Comments

Prolog Manager runs the query and displays the results in the Query Results dialog box.



Line	Location Type	Name	ID
1	Building	St. Ann's School Bldg.	0001
2	Building	St. Ann's School Bldg. 2nd	0002
3	Building	St. Ann's School Bldg. 3rd	0003
4	Building	St. Ann's School Bldg. 4th	0004
5	Building	St. Ann's School Bldg. 5th	0005
6	Building	St. Ann's School Bldg. 6th	0006
7	Building	St. Ann's School Bldg. 7th	0007
8	Building	St. Ann's School Bldg. 8th	0008
9	Building	St. Ann's School Bldg. 9th	0009
10	Building	St. Ann's School Bldg. 10th	0010
11	Building	St. Ann's School Bldg. 11th	0011

5. Click **Close** on the Query Results dialog box. Prolog Manager closes the Query Results dialog box.
6. Click the **Close** button on the Query Manager window. Prolog Manager closes Query Manager.
7. Click **No** to the Update Feature Permissions question. When you add a query, Prolog needs to update the security settings for the query. For this exercise, we will not update security.

### Task C.7 Using the Query in the Company Setup Pick List

In this task, you will open the Company Setup pick list, and use the query you just created to sort all of the Company records.

#### What do I do?

1. Click the **Company Setup** button on the toolbar.

#### What Happens?/Comments



Prolog Manager opens the Company Setup form.

2. Click the **Lookup** button on the Company Setup form.



Prolog Manager opens the Company Setup pick list.

Company ID	Company Name	Type Of Company	Division	Trade
ABKJ	ABKJ Inc.	Engineers	Management	Engineering
AGI	AGI Technologies	Consultant	General Conditions	Testing
ALG	All New Glass	Subcontractor	Glazing	Glazing
ANF	Anchor Fence Co.	Subcontractor	Sitework	Fencing
AZE	Aztech Electric	Subcontractor	Electrical	Electrical
BHS	Builders Hardware and	Major Supplier	Glazing	Finish Door Hard
DEC	Decon	Major Supplier	Concrete	Curbs
DEL	Desiborn Lumber	Major Supplier	Carpentry	
EAV	East Valley Hospital	Owner	General	
FAM	Fairweather Masonry	Subcontractor	Masonry	Masons
FAP	Fawcett Painting	Subcontractor	Finishes	Painting
GEA	GE Appliances	Major Supplier	Furnishings	Appliance Supply
GKI	GK Industrial Refuse	Subcontractor	Equipment	Trash Compacto
HAR	Harris Rebar	Major Supplier	Concrete	Rebar Supply
HFI	Hawitt Architects	Architect	General	Architecture and

### What do I do?

3. In the list in the upper left corner of the **Company Setup** pick list, select **My Company Pick List**.

### What Happens?/Comments

Filter by Query	Description
<Default>	System default pick list
Dunning Letter - Insurance Expiration	
Dunning Letter - Material Safety Data Sheet	
Material Safety Data Sheets Not Supplied	Material Safety Data Sheets not supplied
Insurance Expiration	Insurance where the expiration date is 30 days away, and the Insuran
My Company Pick List	Query for the Company Setup pick list sorted by construction division.

Prolog Manager runs the My Company Picket List query and displays the results in the Company Setup pick list.

Company Type	Name	ID
Architect	U. M. Architecture P.A.	000A
Architect	Medel Architecture Inc.	0001
Architect	Frederick Charles Fredericks	0002
Architect	Johnson and Smith	0003
Architect	Arizona School Facilities	0004
Contractor	ECB-Texas	0005
Contractor	Green Construction	0006
Contractor	Clarking & Associates	0007
Contractor	Lee, Elton, Loversall	0008
Contractor	Proctor Engineers	0009
Contractor	Proctor Engineering	0010
Contractor	Proctor Engineering	0011
Contractor	Proctor and Elton	0012
Contractor	Smith, Matthews and Wilson	0013
Contractor	Thomas Proctor Associates	0014
Contractor	Van Gilder Allen &	0015
Contractor	West Associates	0016

4. Click the **Close** button.
5. Close the **Company Setup** form.

Prolog Manager closes the Company Setup pick list.

From this point on, each time you open the pick list for the Company Setup form, Prolog Manager will automatically use the My Company Pick List query to sort to records.

**Note:** Whenever a query with a filter is applied to a pick list, the lookup buttons on the data entry form will scroll through only records produced as a result of the query. For example, if we had created a query for the RFI pick list that filtered the records to show only overdue RFI's and then opened the RFI data entry form and used the scroll records buttons, we would only scroll through RFI records that were overdue. Any RFI records that were not overdue would not show up. For this reason, it is recommended that you practice the habit of always resetting a pick list query to the standard <Default> option when you are finished using your own custom query.



# ***Reports***

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# Chapter 13

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## ARIZONA SCHOOL FACILITIES BOARD

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### Students FIRST Program

# TOOLS

### Chapter Description

In this Chapter, you will use features in Prolog Manager that help you to work faster and more efficiently. This Chapter contains the following tasks:

- A. Using Prolog Today
- B. Using Auto Alerts
- C. Using the Hot List



## A. Using Prolog Today

The Prolog Today tool displays the project data you are most likely to need on one screen that you can customize in a variety of ways.

### Task A.1 How do I Use Prolog Today?

#### What do I do?

1. On the main toolbar, click **Prolog Today**

#### What Happens?/Comments



Prolog Today appears:



Prolog Today displays the following information as both a data list and pie chart indicating a breakdown of it.

**Hotlist** – shows all items

**Request for Information** – shows all pending

**Submittal Register (all due)** – shows all due

**Submittal Packages (mine)** – shows all the logged on user's

### What do I do?

2. To customize Prolog Today, Click **Customize Prolog Today...**

### What Happens?/Comments

Customize Prolog Today...

The Customize Prolog Today dialog appears:



3. Check all the boxes *except* **Automatically run when a project is opened.**

4. Click **Save Changes**

Save Changes

5. Click **Close**

**Prolog Today** closes

The following chart describes all the settings available in **Prolog Today**:

#### **To set Prolog Today to do this:**

#### **Here's What to Do:**

Appear when a project is opened

Beside Prolog Today check **Automatically run when this project is opened.**

Show all due **HotList** items

Beside **HotList**, select **Show**

Show all pending **Requests for Information**

Beside **Request for Information**, select **Show**.

Show my due **submittal register** items

Beside **Submittal Register**, select **Show Mine**.

Show all due **submittal register** items

Beside **Submittal Register**, select **Show all due**.

Show my due **submittal package** items

Beside **Submittal Packages**, select **Show Mine**

Show my due <b>punch list</b> items	Beside <b>Punch List</b> , select <b>Show Mine</b>
Show all due <b>punch list</b> items	Beside <b>Punch List</b> , select <b>Show all due.</b>
Show a summary of the <b>projected budget</b>	Beside <b>Budget Summary</b> , select <b>Show budget.</b>
Show a summary of the <b>projected cost.</b>	Beside <b>Budget Summary</b> , select <b>Show cost</b>
Show a summary of all <b>prime contract change orders</b>	Beside <b>Change Orders Summary</b> , select <b>Show prime contract</b>
Show a summary of all <b>subcontract change orders</b>	Beside <b>Change Orders Summary</b> , select <b>Show subcontract.</b>
Run my <b>auto alerts</b>	Beside <b>My Auto Alerts</b> , select <b>Show.</b>
Retrieve <b>due items</b> before the due date	In the <b>Number of days notice</b> list, select the number of days before the due date that Prolog Today will retrieve items.

## B. Using the HotList

The HotList form is a “to-do” list. It tracks the items on which you need to follow up or complete. The HotList form keeps you organized and ahead of deadlines. You can add items to your HotList by linking records in other formats to the HotList or by creating a new HotList record for each item that needs to be completed.

### Task B.1 How Do I Create a HotList Record in the HotList Form?

You can create a record at any time in the HotList form to help you manage project items. To create a record, you can assign a subject and type to the item you want to complete, as well as an assigned date and a due date. In this task, you will create a HotList item to remind yourself to send an issue letter.

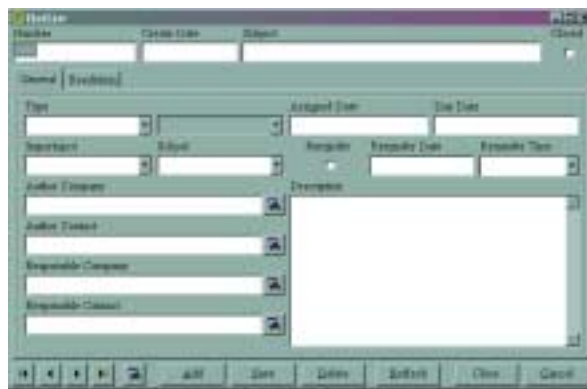
#### What do I do?

1. On the Switchboard, click **Doc Control** and on the menu, click **Hotlist**

#### What Happens?/Comments



The HotList form appears. The next available record number appears in the Number field.

A screenshot of the HotList form. It features a title bar "HotList" and a menu bar with "General" and "Activities". The form has several fields: "Number" (with a dropdown arrow), "Create Date", "Subject", "Assigned Date", and "Due Date". Below these are "Important" and "Subject" dropdowns, and "Reminder" and "Reminder Date" dropdowns. There are also fields for "Author Company", "Author Contact", "Responsible Company", and "Responsible Contact", each with a dropdown arrow. A large "Description" text area is on the right. At the bottom are buttons for "add", "Save", "Delete", "Refresh", "Close", and "Cancel".

2. In the **Create Date** field, press **CTRL + D**.
3. In the **Subject** field, type: **Write letter regarding RFI issue**.
4. On the **General tab**, in the **Type** list, select: **Write Letter**
5. In the **Due Date** field, press **CTRL + D**.
6. Select the **Reminder** check box

Today's date appears in the Create Date field.

Today's date appears in the Due Date field

Before this task is due, a pop-up message will appear to remind you of it.

- | <u><b>What do I do?</b></u>                                 | <u><b>What Happens?/Comments</b></u>                   |
|---|--|
| 7. In the <b>Reminder Date</b> field, press <b>CTRL + D</b> | Today's date appears in the Reminder Date field.       |
| 8. In the <b>Reminder Time</b> field, type: <b>2:00 PM</b>  | At 2:00 pm a message reminds you to complete the task: |



- |  |   |
|--|---|
| 9. In the <b>Responsible Contact</b> field, type the user name you used to log on to the database. | When you move to another field on the form, your company name appears in the Responsible Company field. |
| 10. Click <b>Save</b>  |   |

---

**Note:** In order to receive reminder messages you need to enter the same name in the Responsible Contact field as the name you use to log on to Prolog Manager. The reminder appears five minutes before the time you entered in the Reminder Time field.

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**Note:** When you receive a HotList reminder, you can click the Open Item button to view the HotList record for which you set the reminder.

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## C. Using Auto Alerts

Prolog Manger auto alerts are system and user-defined queries that produce a list of items that may require immediate attention. Each alert procedure checks for a specific type of pending or late item, such as RFI's or inspections. You can run the auto alerts individually, or all at one time. The alerts are processed by Query Manager and results appear in a Query Results window.

### Task C.1 How Do I Run System Auto Alerts?

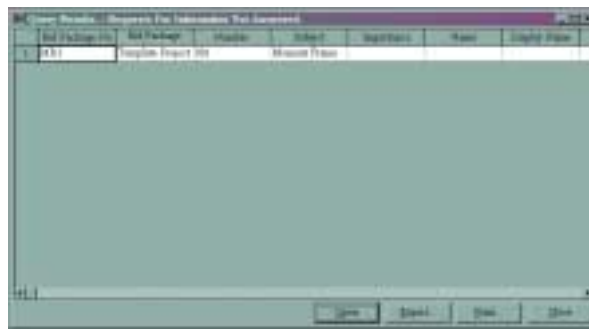
In this task, you will run an auto alert for all requests for information that have overdue answers.

#### What do I do?

1. On the **Tools** menu, point to **Auto Alerts** ;on the submenu point to **System Alerts**, and click **Requests for Information Not Answered**

#### What Happens?/Comments

The query runs and when it is complete, the results appear in the Query Results: Requests For Information Not Answered window. Each RFI for which an answer is overdue appears as a row in the grid:



You can also access auto alerts by clicking Auto Alerts on the toolbar:



2. In the query results, double-click the first row.
3. Click **Close**
4. On the **Query Results: Requests For Information Not Answered** window, click **Close**.

The Request for Information record appears. You can edit the record.

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**A Cool Tool:** You can print the Query Results list: Click the Print button. You can also export the Query Results list to a Microsoft Excel spreadsheet. Click Export and name and save the list as an .xls file. Then open it in Excel.

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**Reminder:** When you are on ProjectTalk.com, all of the information you are inputting is sitting on a server in California. Therefore, if you want to export query results to your computer, you must select to save it to the following drive: C\$ on 'Client' (X:). This will access the hard drive on your computer and save the information there.

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# ***Reports***

---



# ***Chapter 14***

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## **ARIZONA SCHOOL FACILITIES BOARD**

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### **Students FIRST Program**

# **REPORT MANAGER**

### **Chapter Description**

This Chapter includes the following tasks and explanations:

- A. Using Report Manager
- B. Running ASFB Reports



## A. Using Report Manager

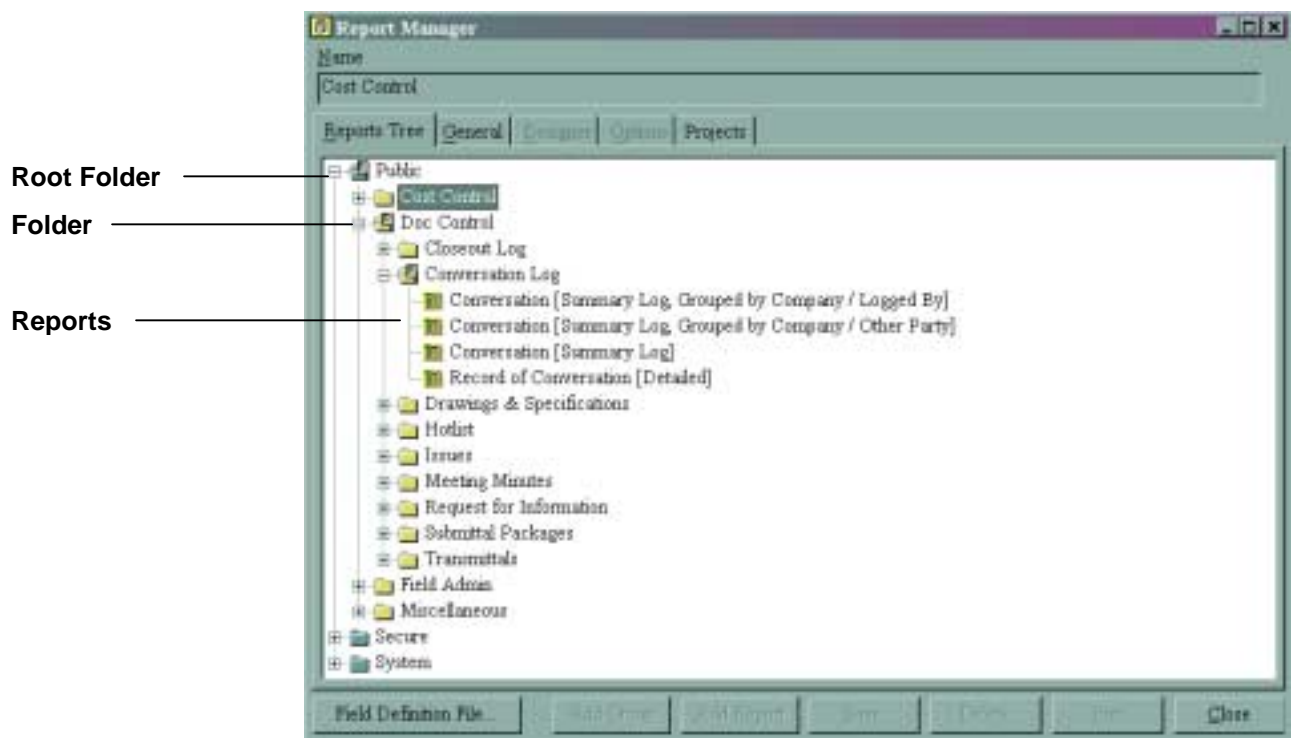
Report Manager creates and generates reports. It searches your project database for records that meet a set of criteria and then displays the information in an organized format. Report Manager comes with a number of pre-defined reports. These reports have been modified for you by the ASFB.

When you open Report Manager, you see the Reports tree displayed on the Reports Tree tab. The Reports tree looks and works like Windows Explorer. You can click the plus sign next to a folder to expand that part of the tree and see all of the folders or reports in that branch of the tree. Click the minus sign next to a folder to collapse the branch and hide the folders and reports.

The Reports tree always displays the three root folders: Public, Secure and System. Root folders cannot be renamed, moved, or deleted. Root folders are used to organize pre-defined and custom reports. The Reports in the Public folder are the reports that are available to all users that have been modified for your use. There are also reports that will be available to you in the secure folder. The reports available to you in the secure folder will be dependant on your security level.

The following illustration identifies the main parts of the Reports tree:

### Reports Tree:


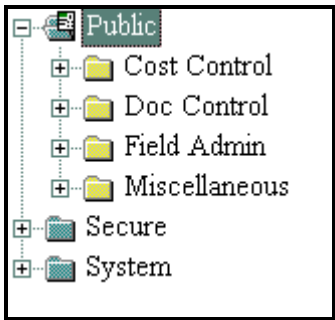



## B. Running ASFB Reports

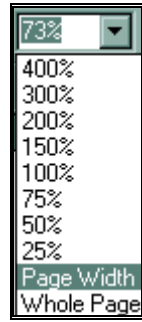
When you run a report, Prolog Manager selects all the records in your database which match a specified criteria and then displays the information in an organized format. The Public folder in Report Manager contains all the default reports that have been designed by the ASFB.

### Task B.1 How Do I Run a Report?

In this task, you will run a report in the Public folder.

<u>What do I do?</u>	<u>What Happens?/Comments</u>
1. On the toolbar, click <b>Report Manager</b> .	 The Report Manager opens.
2. On the <b>Reports Tree</b> tab, click the + (plus sign) next to the <b>Public</b> folder	Report Manager displays the Public reports subfolders: 
3. Click the + (plus sign) next to the <b>Doc Control</b> folder	The Doc Control report folders appear
4. Click the + (plus sign) next to the <b>HotList</b> folder	The HotList report appears
5. Select the <b>Hotlist [Detailed]</b> report	The report title and subtitle appear at the top of the Report Manager window.
6. Click <b>Run</b>	 The Preview window opens and displays the report.

7. To see the entire report, set the view to **Page Width**.



The report page appears resized so that you can see the width of the page in the Preview window.

8. Click the **Close** button

The Preview window closes.





# ***Chapter 15***

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ARIZONA SCHOOL FACILITIES BOARD

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Students FIRST Program

## **WORD PROCESSING**

### Chapter Description

This Chapter includes the following tasks and explanations:

- A. Using Mail Merge
- B. Dunning Letters



## **A. Overview of Word Processing in Prolog**

Prolog Manager offers its users the ability to create letters and other correspondence that leverages existing data from the database. In addition to creating the documentation, Prolog Manager will then file and store the correspondence in the database for later retrieval.

As you become more familiar with the functionality of the Word processing tools in Prolog Manager, you will begin to see the efficiency of using Prolog as your primary documentation tool. Some general examples of the types of documentation that can be created within Prolog are as follows:

- To write a general letter to any company set up in the database, a user can quickly start the letter by selecting a template that will automatically fill in the job information and the correct company name and address, after which the user can then type the body of the letter. When done, Prolog automatically files the letter for easy retrieval at a later time.
- By using the Dunning Letters feature, the user can quickly create letters to all subcontractors, outlining their submittal requirements for the project. As submittal items become overdue, letters can be automatically created addressed to the appropriate company, detailing what is overdue. This example can be applied to all data groups within Prolog and can save a considerable amount of time both during the project and especially during closeout.

## B. Mail Merge

### Task B.1 Using Mail Merge

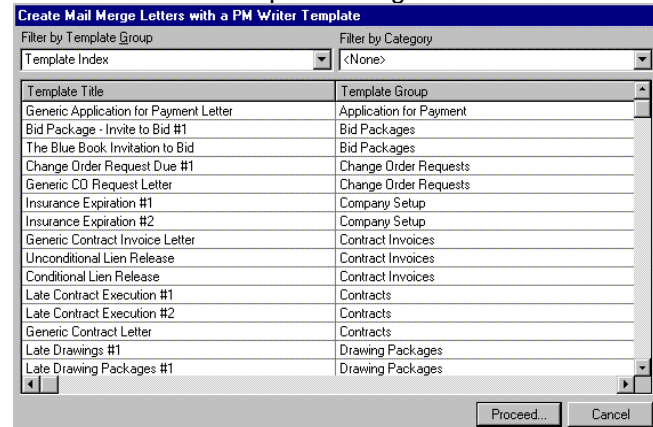
The following example we will use PM Writer to generate a generic letter to a subcontractor on the project. The key to understanding word processing in Prolog is to understand the concept of Mail Merge and Document Templates. PM Writer uses document templates that search for fields within the database to merge into the document. Once the merge process takes place a new document is automatically created with the results. The user can edit this document without altering the original template.

#### What to do

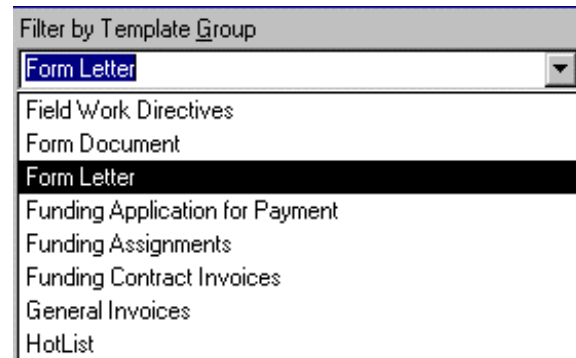
1. On the Word Processor menu, point to Mail Merge, and click PM Writer.

#### Results/Comments

Prolog Manager opens the Create Mail Merge Letters with a PM Writer Template dialog box.



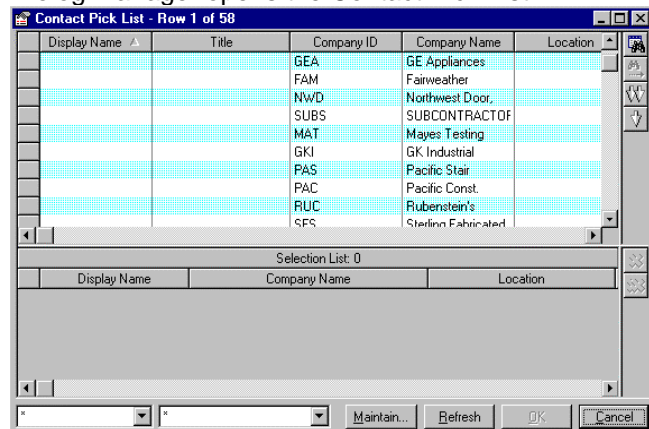
2. In the Filter by Template Group list, select Form Letter.



3. In the Templates Title column, select Generic Contractor Letter.

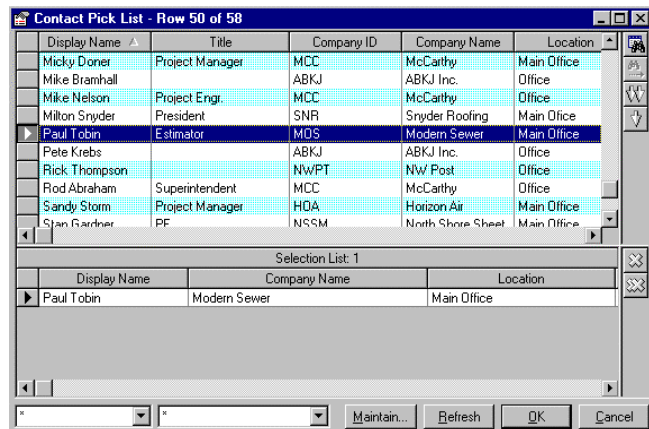
4. Click Proceed.

Prolog Manager opens the Contact Pick List.



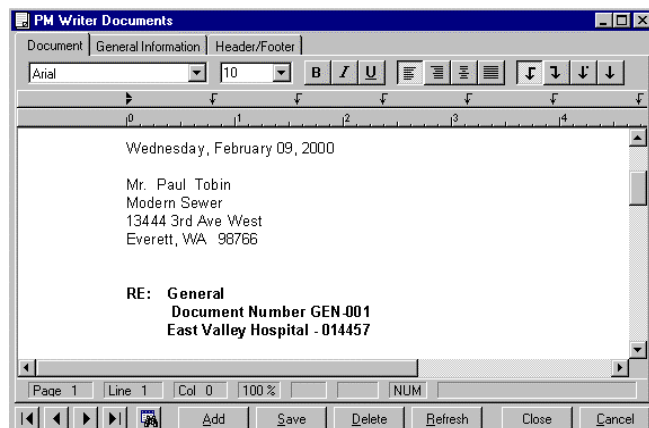
5. Scroll down the list and select Paul Tobin by double-clicking his name.

Prolog Manager adds Paul Tobin to the Selection list on the bottom of the Contact Pick List.



6. Click OK.

Prolog Manager closes the Contact Pick List, opens the PM Writer Document window, and generates the letter to Paul Tobin.



7. In the letter, next to RE, delete General.

8. Next to RE, type: Meeting Notification.

**RE: Meeting Notification**  
**Document Number GEN-001**  
**East Valley Hospital - 014457**

9. In the body of the letter, type: A meeting will be held to discuss closeout of your contract on June 4th at 8 AM. Please attend.

Dear Mr. Tobin,

A meeting will be held to discuss closeout of your contract on June 4th at 8:00 a.m.  
Please attend.

Respectfully,

## Task B.2 Naming and Saving your Letter

In this task, you will use the General Information tab in the PM Writer Documents window to define the group, topic and category of the letter.

### What to do

1. Click the General Information tab.

### Results/Comments

The screenshot shows the 'PM Writer Documents' window with the 'General Information' tab selected. The window contains several fields for document metadata: Document ID (6), Number (GEN-001), Date (2/9/00), Title (Closeout Meeting Notification), and a Closed checkbox. Below these are dropdown menus for Topic (Contract Correspondence) and Category (General Letters). Further down are sections for Company (Name: Modern Sewer, Attention: Paul Tobin) and Vendor (Name and Attention fields). At the bottom is a large text area for Notes. The window has a standard Windows-style title bar and a toolbar with buttons for Add, Save, Delete, Refresh, Close, and Cancel.

Notice that Prolog Manager already entered information into the Number, Date, Title, and Topic fields. Prolog Manager automatically assigns the letters that next sequential number and enters today's date in the Date field. Prolog Manager uses the Title and Topic specified for the templates as the Title and Topic for the letter.

2. In the Title field, type: Closeout Meeting Notification.
3. In the Topic list, select Contract Correspondence.
4. Click Save.

### Task B.3     Activating the Word Processing Toolbar

Some documents require additional editing such as bold fonts, underlining, search and replace, etc. In this task, you will activate the PM Writer Word Processing Toolbar. The toolbar provides you with buttons for editing the PM Writer document, similar to Microsoft Word's capabilities.

#### What to do

1. On the Tools menu, point to Toolbars and click Word Processing.

#### Results/Comments



The Word Processing toolbar is displayed at the right-hand end of the Prolog Manager Standard toolbar.

2. Click on the double line handle to the left of the printer icon and drag the Word Processing toolbar down and to the left. Release the mouse button.
3. Click Save.
4. Click Close in the PM Writer Documents window.

The Word Processing toolbar is “docked” under the Standard toolbar. This toolbar allows you to edit the formatting of the document, insert tables and merge fields, print and perform other word processing tasks.



## C. Dunning Letters

Dunning letters are pre-designed documents that you can use to remind companies of requirements, upcoming items that are due, or overdue items. In Prolog Manager you can choose from several different Dunning letter templates, or you can create your own.

The Dunning letter consists of two parts: a word processor template and a query. When a Prolog user activates the Dunning letter, a query searches a specific data group for specific criteria, and if records exist that meet the criteria, the results are inserted into the text of a letter template. The letter template typically consists of the title block, leading paragraph, trailing paragraph, and signature block that are all formatted to be consistent with the query design. For example, a Dunning letter concerning overdue RFI answers would have leading and trailing paragraphs that reference RFI's that have not been answered and are overdue. The query will search for overdue RFI's. If overdue RFI's exist in the database, the results will be a letter addressed to the responsible company listing all of the overdue RFI's. If the database does not contain any overdue RFI's, no letter will be produced.

Dunning letters are completely dependent upon data contained within the database, and are only as reliable as the underlying data. If the database is not kept up to date, records can show erroneously on Dunning letters as being overdue and requiring action. However, if the database is kept current Dunning letters can be used to regularly update companies in written form of their requirements with minimal effort.

## Task C.1 Creating Dunning Letters

### What to do

1. On the Word Processor menu, point to Dunning Letters, and click PM Writer Dunning Letters.
2. In the Filter by Template list, select Company Setup.
3. Under Template Title, select Material Safety Data Sheets.
4. Click Next.
5. Under Query, select Dunning Letter -- Material Safety Data Sheets.

6. Under Company Field, select Company.Company ID.

### Results/Comments

Prolog Manager starts the Dunning Letter wizard.

Template Title	Template Group
Material Safety Data Sheets	Company Setup
Insurance Expiration #2	Company Setup
Insurance Expiration #1	Company Setup

The wizard filters the templates in the grid to only display templates associated with the Company Setup form.

Under Company Field, Prolog Manager displays the Company fields in the query.

Query	Company Field
Dunning Letter - Insurance Expiration	Company.Company ID
Dunning Letter - Material Safety Data Sheet	
Material Safety Data Sheets Not Supplied	
Insurance Expiration	
My Company Pick List	

## What to do

7. Click Next.

## Results/Comments

Prolog Manager displays the list of companies with unsubmitted Material Safety Data Sheets in Step 3.

PM Writer Dunning Letter Wizard - Step 3 of 3

The following list contains the names of all the companies for which a dunning letter will be created. If there is a company listed that you do not want a dunning letter for, simply clear the Selected checkbox for that company. To begin the merge process choose Finish when you have verified all of your selections.

Selected	Company ID	Company Name
<input checked="" type="checkbox"/>	ALG	All New Glass
<input checked="" type="checkbox"/>	AZE	Aztech Electric
<input checked="" type="checkbox"/>	FAP	Fawcett Painting
<input checked="" type="checkbox"/>	HDA	Horizon Air Mechanical, Inc.
<input checked="" type="checkbox"/>	JAS	Jackson Steel
<input checked="" type="checkbox"/>	JRH	J R Hayes & Sons
<input checked="" type="checkbox"/>	LOS	Lone Star Northwest
<input checked="" type="checkbox"/>	OTE	Otis Elevator
<input checked="" type="checkbox"/>	PAF	Patriot Fire Protection

Help Cancel < Back Next > Finish

8. Select all the companies for which you want to create Dunning letters.
9. Click Finish.

Prolog Manager opens the PM Writer Documents window. You can preview each Dunning letter you create before printing.

PM Writer Documents

Document General Information Header/Footer

Arial 10 B I U

Mr. Kevin Marr  
Patriot Fire Protection  
2707 70th Ave. East  
Tacoma, WA 98424

**RE: Material Safety Data Sheets  
East Valley Hospital - 014457**

Dear Mr. Marr,

Our records indicate that some or all required Material Safety Data Sheets h

Page 1 Line 1 Col 0 100% NUM

Add Save Delete Refresh Close Cancel

10. Close the window.